MAIL MANAGEMENT IN GOVERNMENT DEPARTMENTS AND AGENCIES

Records Management Series

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MAIL MANAGEMENT
IN
GOVERNMENT DEPARTMENTS
AND
AGENCIES

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Plate

This publication has been prepared by the Records Management Branch of the Public Archives of Canada.

Other publications in the Records Management Series:
General Records Disposal Schedules of the Government of Canada
Records Management Guide for Ministers' Offices
Records Organization and Operations
Records Scheduling and Disposal
Subject Classification Guide

INTRODUCTION

1. PURPOSE OF THIS HANDBOOK

One author has described an efficient organization, of any size, as one that does things right, and an effective organization as one that does the right things.

The purpose of this handbook, in general terms, is to help government Mail Room Managers to operate efficiently and effectively, i.e., *to do the right things right.* More specifically, this book will be:

    (a) a convenient reference for the Mail Room Manager and for all others who have any responsibility for mail handling operations;

    (b) an outline of sound mail management practices that will provide our government with the best value for each mail handling dollar spent; and

    (c) an authoritative source of technical information and of operational guidelines that will enable all Mail Room personnel to do their jobs better.
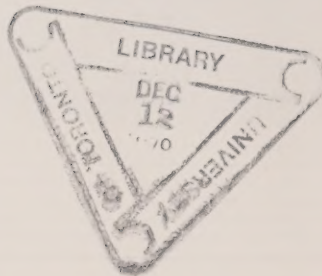
2. DEFINITION OF MAIL MANAGEMENT

Mail management means:

    (a) the receiving, sorting, opening, routing, controlling, and distributing of *incoming* mail;

    (b) the collecting, sorting, and distributing of paperwork coming from within the building or area serviced by the Mail Room; and

    (c) the collecting, preparing, sorting, controlling, and dispatching of *outgoing* mail.

3. FUNCTION OF A MAIL ROOM

The Mail Room provides a vital service to its department or agency. This service must maintain the flow of mail, documents, files, and other paperwork in three channels:

    (a) from outside to offices within the department or agency;

    (b) from office to office within the building or area being serviced; and

    (c) from offices within the department or agency to outside individuals or organizations.

4. GOVERNMENT MAIL COSTS

The activities of the federal government have great importance in the business, social, and economic functions of our society. These activities must usually depend on the efficiency and effectiveness of our Mail Room services to achieve the many objectives of government. Each day, a vast amount of mail is sent and received. This mail, in addition to the time and stationery required to compose, type, and sign it, costs money:

    (a) to process within the departments and agencies;

    (b) to transport to and from the Post Office; and

    (c) to process at the Post Office.

5. **METHODS OF REDUCING MAILING COSTS**

Mail processing within a department or agency should be included in senior management's budgetary control systems to ensure that:

(a) bulk envelope mailings are used for large quantities of mail addressed to region, district and field offices, and to other addresses, to reduce costs to the Post Office and, eventually, to the department;

(b) motor vehicles, when used only for mail collections and deliveries, are hired on contract rather than purchased by the department, to reduce departmental transportation costs;

(c) all mail is separated into its correct mailing class (first, second, etc.), and also pre-sorted into groupings like airmail and registered mail, as well as by city, province, etc., to reduce Post Office processing costs;

(d) special services, like airmail and registered mail, are used only when necessary, to reduce mail transportation costs;

(e) "window envelopes" are used as much as possible, to reduce addressing costs.

6. **MESSENGER SERVICES AND DELIVERY DEVICES — MANUAL and/or AUTOMATED**

(1) In general, the smaller departments and agencies will continue to utilize the normally accepted system of manual pick-up and delivery type of messenger services. However, as new modern buildings come into use, it should be expected that more efficient systems will be installed for the movement of internal documents and paperwork within such buildings. These systems would include:

(a) conveyer belts — both vertical and horizontal;

(b) pneumatic tubes; and/or

(c) dumb-waiters.

(2) Some departments and agencies are now equipped with automated delivery devices. An example is shown at Plate I. Today's technology now provides for automatic, unmanned, self-propelled internal mail delivery vehicles (See Plate II). The usual types of messenger hand-trucks are illustrated at Appendix F, Plate XXIX.

PLATE I   **AUTOMATED DELIVERY DEVICE**
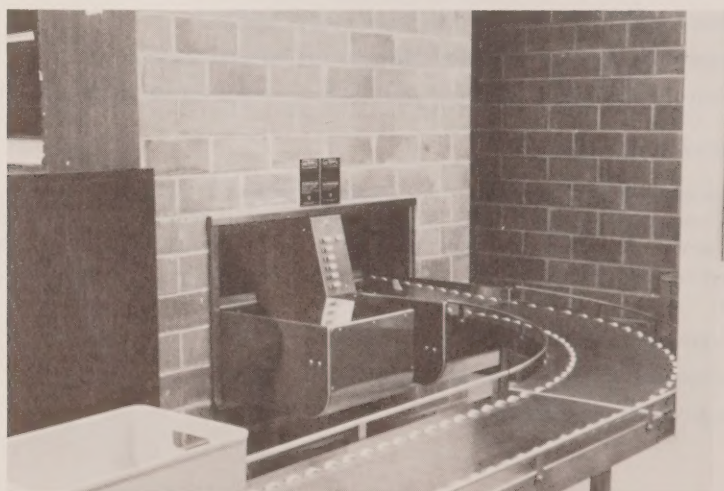
Photo Courtesy of Lear Siegler, Inc.

PART I

ORGANIZING THE MAIL ROOM

Section 1 – Principles

1. **THE FIVE PRINCIPLES**

    The basic principles of planning, organizing, co-ordinating, controlling and budgeting apply to the mail room and messenger services as they do to any other area of management. These principles apply not only in setting up or modifying existing operations but also apply in the daily routine of a mail room.

2. **PLANNING**

    The mail room manager must conduct surveys to determine the volume of mail to be processed, where and when the mail must be delivered and collected, and how much time must be allotted for complete pick-up and delivery schedules. He must establish work-flow patterns, both within the mail room and for the messenger routes for internal and external delivery, and plan the proper mail processing routines for the efficient flow of mail through the unit.

3. **ORGANIZING**

    This responsibility includes the allocation of duties and responsibilities to the staff members and the systematic use of other resources. The manager must determine who is to be assigned to specific jobs, how many of his staff will be required to perform each operation, and when the particular jobs must be performed.

4. **CO-ORDINATING – CONTROLLING**

    (1)   For larger departments, these functions may require to be organized at a level more senior than the Mail Room Manager. In such cases, they will be part of the major duties of the Records Manager who will be required to co-ordinate the activities of more than one records office with the mail room services and operations as well as the several large branches of the department.

    (2)   The Records Manager will be required to ensure that the messenger services do not overlap and that the mail will not be controlled at more than one point within the department. This co-ordinating and controlling function must be reviewed periodically to ensure that the original methods and procedures are still being carried out or that modifications for improvement are introduced when necessary.

    (3)   In smaller departments, an experienced Mail Manager should be able to resolve without difficulty most problems that might arise.

5. **BUDGETING**

    Budget forecasts for the operation of the mail room will normally be performed under the direction of the Records Manager for the headquarters requirements. These forecasts would include such areas as the postage costs, any equipment replacement needs, and the procurement of additional operating equipment when justified. The consolidation of all the other field mail rooms estimates for the overall postage costs would then be undertaken by some other office within the administrative services of the department.

6   MAIL ROOM ORGANIZATION CHART

(1) Plate III shows one concept of the organization of a mail room. This will normally be applicable to a larger department and there will be three distinct areas of major operation:

(a)   one for the incoming mail;

(b)   one for the internal messenger services of delivery and pick-up activities: this may require service within one building, or both external and internal service for several separated buildings occupied by the same organization; and

(c)   one for the outgoing mail.

(2) Plate IV shows in some descriptive detail all the varied operations encountered in carrying out the duties and responsibilities of a Mail Room Manager whether such operations are for a large or a small department.

MAIL ROOM ORGANIZATION CHART   PLATE III

```
                                              ┌─────────────┐
                                              │  RECORDS    │
                                              │  MANAGER    │
                                              └─────────────┘
                        ┌──────────────────┐
                        │  MAIL MANAGER    │
                        └──────────────────┘
                        ┌──────────────────┐
                        │   ASSISTANT      │   (In large departments)
                        └──────────────────┘
```

INCOMING MAIL SECTION	MESSENGER SERVICES SECTION	OUTGOING MAIL SECTION
PRIMARY SORT	INTERNAL DELIVERY – DIRECT and – RECORDS OFFICES	PREPARATION – PACKAGING – ENVELOPING - SEALING
MAIL OPENING and SECOND SORT	EXTERNAL DELIVERY and OUTGOING MAIL	SORT BY GROUPS – PROVINCES – CITIES – COUNTRIES
REGISTERED MAIL and VALUABLES DIPLOMATIC MAIL (If applicable)		REGISTERED MAIL DIPLOMATIC MAIL (If applicable)
		SPECIAL SERVICES – ADDRESSOGRAPH – PHOTOCOPYING (If applicable)

PLATE IV   TYPICAL MAIL ROOM OPERATIONS

MAIL MANAGER

MAIL OPERATIONS

DELIVERY OPERATIONS

SORT INCOMING MAILS.

SEGREGATE AND DELIVER
DIRECT-DELIVERY MAIL.

DELIVER MATERIAL TO
RECORDS OFFICE(S).

PROCESS INCOMING
REGISTERED MAIL.

MAINTAIN RECEIPTS FOR
REGISTERED MAIL.

PROCESS INCOMING DIPLOMATIC
MAIL, IF APPLICABLE.

PROCESS INCOMING
VALUABLES IN MAILS.

PREPARE AND DISPATCH
OUTGOING MAILS –

   Ordinary,
   Registered,
   Diplomatic, if applicable.

SORT INCOMING AND INTRA
MATERIAL TO DISTRIBUTION
BOXES.

MAINTAIN EFFICIENCY
CHECK SYSTEM ON SORTED
MATERIAL TO MINIMIZE
IMPROPER DELIVERY.

MAINTAIN ROUTE DELIVERY
SCHEDULES TO AND FROM
OFFICES.

OBTAIN SIGNATURES FOR
REGISTERED ITEMS AND
DIPLOMATIC MAIL, IF
APPLICABLE.

BETWEEN DELIVERY TRIPS
ASSIST IN OTHER AREAS
AS REQUIRED.

Section 2 – Space, Layout and Equipment

1. BASIC ARRANGEMENT

(1) Space and layout refer to the physical arrangement of all mail rooms and their facilities of furniture and equipment. When assessing the arrangement which is to be made, attention must be paid to the space required for necessary storage and movement of mail within the mail room. In addition, space which will be required for the servicing and maintenance of the facilities also needs consideration. The flow of incoming mail must be arranged so that a natural sequence is followed through the mail room to the actioning offices, while outgoing mail will have its last processing point as close to the exit as possible.

(2) To achieve a well laid out mail room, the basic considerations include:

    (a) reduction of the distances required for the movement of mail and the motions of personnel processing it;

    (b) the rate at which work flows through the unit;

    (c) the use of all space as effectively as possible in both horizontal and vertical directions;

    (d) flexibility so that rearrangements can be readily introduced to meet changing demands;

    (e) convenience for servicing and maintenance; and

    (f) adequate security.

2. APPROACH TO THE LAYOUT PROBLEM

(1) The approach to a layout problem is the same as the systematic approach to any other management problem. The major considerations are:

    (a) study the problem: the nature and scope of the job must be clearly defined at the beginning;

    (b) establish the facts involved: data must be gathered on mail volume, mail flow, dispatch times, service requirements as to delivery frequency, proper allocation of internal delivery points, and any other relevant factors. Where past records are used, it is necessary to ensure that the information is factual;

    (c) restate and clarify the problem in the light of the facts obtained: this may show that the original problem was not properly defined;

    (d) analyse and decide on the best solution: weigh the various considerations against one another, assemble and evaluate the data and compare;

    (e) initiate action for approval: detailed plans must be agreed upon by all concerned once the solution has been decided upon; and

    (f) follow up: ensure that the accepted layout continues to meet the demands of a changing or expanding operation.

(2) The location of the mail room should be chosen near an elevator and as close as possible to the main records office. Ideally, space allocation within the mail room should be divided to correspond to the distinctive operations.

(3) As an aid to complete planning, the experience of other departments should be investigated. Such matters as the volume figures of other departments and the actual space area assigned to their mail rooms will afford valuable data for comparison and will assist in arriving at a logical decision. In general, the size of the mail room is usually in proportion to the volume of work and the quality of service it will provide.

3. STAGES IN PREPARING LAYOUT

(1) The actual preparation of a mail room layout consists therefore of the accumulation and study of all the facts available. This will entail compiling a mail room inventory which will be applied:

    (a) to establish a list of the special equipment which is peculiar to the needs of a mail room;

    (b) to establish the floor area required for this special equipment, along with the other normal office furniture and effects, as well as providing sufficient other space for movement and storage facilities; and

    (c) to make templates for each piece of equipment whereby various different arrangements on a floor plan of the allotted space may be tried out.

(2) In addition to the normal office furniture, the following is given as a typical list of the special mail room equipment required. This represents the requirements for a large-volume operation. Judicious selection should be made for smaller requirements:

    (a) a flatbed hand-truck for transporting the mail bags to and from the motor vehicle which operates between the department and the Post Office;

    (b) proper sort racks with bases for first primary sort of incoming mail fitted with suitable internal-office identification designations (see Plate VII);

    (c) proper mail opening facilities with suitable table-top sort rack-trays (see Plate XII);

    (d) a mechanical or electric letter opener, if justified by volume of mail (see Plate XVI);

    (e) a time-stamp for specific items which justify this equipment, e.g. tenders;

    (f) an electric bostitch, if justified by volume of mail;

    (g) proper internal messenger service hand delivery vehicles;

    (h) outgoing mail preparation equipment including:

        (i) wrapping table for packaging (see Plate XX),

        (ii) wrapping paper in rolls with dispensing rack,

        (iii) a counter-boy tape dispenser,

        (iv) a ball of twine with holder;

    (i) sort racks with bases for outgoing mail identified for required bulk or group envelope mailing preparation (see Plate XVIII);

    (j) a second set of sort racks with bases for Post Office groupings of outgoing mail, i.e. registered, airmail, provincial groups, local delivery, overseas, mail for U.S.A., etc.;

    (k) scales to calculate postal expenditures so that these are kept within the estimated budget figures;

    (l) postage meter machines, as required;

    (m) mail bag holders suitable to volume output requirements;

    (n) various rubber stamp aids to promote ease of different operations.

(3) In using the templates on the floor plan of the allotted space, the measurement of each piece of equipment should be recorded. The layout will include all the above equipment and also the normal office furniture items. In addition, the space required for the movement of personnel and of the mail delivery vehicles must be kept in mind. The aisle widths should be sufficient to allow freedom of movement and to prevent interference between the different operations of the mail room.

(4) The relative positions of the equipment can be determined by a trial method of different arrangements. At this stage, consideration must be given to the position of equipment from the following points of view:

(a) the flow of incoming mail;

(b) the flow of intradepartmental material, i.e. mail, documents, files, etc.;

(c) distribution of aisles or passageways;

(d) dimensions of the whole area; and

(e) positions of fixed obstructions such as pillars, recesses, etc.

4. WORK FLOW LAYOUT

(1) A work flow layout or line production (see Plate V) is one in which equipment is arranged according to the sequence of operations necessary to perform a particular job. This type of layout is usual in mail rooms and should be followed, subject to any special needs. When the equipment is placed according to the sequence of operations, work flows in a continuous line and additional walking, doubling back and duplication of actions are avoided or at least reduced.

(2) The most effective arrangement of equipment can be determined by the use of string diagrams or flow charts with the following considerations re-emphasized:

(a) mail should flow naturally from the entrance through the mail room without backtracking or duplication of functions;

(b) space and equipment should be arranged to permit the use of additional staff at any one work station when required during peak periods; and

(c) space should be allowed for the silent hours accommodation of the mobile equipment such as flat-bed trucks and hand delivery vehicles.

5. MODERN COMPLEX EQUIPMENT

(1) Mail Room Managers will keep abreast of new developments in mail handling and in mail room equipment by reading current literature on mail management, attending seminars and courses and by maintaining an awareness of any areas for improvement. Close contact should be maintained with postal officials so that the manager may be kept informed of postal developments that may require any operational change.

(2) The Post Office Department is prepared to advise departments and agencies in the acquisition of mail room equipment. Items of standard post office equipment may be made available at cost. Requests for such assistance should be made to the appropriate Postmaster.

(3) The mail operations should be periodically reviewed to determine if the use of additional or new equipment would effect savings in time or costs. The initial cost of such equipment may well be quickly recovered in the savings made on reduced labour costs. Where the mail room operation is large, consideration could be given to the installation of modern mechanized devices such as automatic letter openers, envelope sealers, pneumatic tubes, conveyor belt systems, collating aids, mail folders and inserters, etc. The initial cost must be weighed against the potential savings and a decision taken.

6. SUMMATION

(1) When considering the establishment or the revision of a mail room operation, all the management tools available should be used. Volume data, cost control information, flow charts, routing data, delivery aids, etc., should be examined in relation to the proposed new or revised installation. Provisional estimates as to service improvements and cost reductions should be made and submitted to management before any decisive steps are taken.

(2) Some government departments have Methods or Systems units in their organization and full advantage should be taken of this resource in planning and layout of mail rooms. Those government departments which do not have such units may find the assistance of the Post Office Department Methods and Standards Officers helpful. These officers are trained and experienced in mail handling procedures and are available on an advisory basis to other departments and agencies for this purpose.

(3) Other postal informational services are contained in the *Canada Official Postal Guide*. This manual is available from Supply and Services Canada and outlines the general postal laws and regulations. It contains postage rates, fees for special services and conditions governing mail posted in Canada for delivery in Canada and other countries. Also included is information on government mail, the re-direction of mail, undeliverable mail, general prohibitions and financial services. An amendment service to this manual is provided for a yearly fee, and these amendments are obtained from Supply and Services Canada.

(4) In addition, charts showing postal rates for all types of service are available. Such charts are useful in computing the budgetary figures for mail room costs and in keeping mail room staff aware of the costs of the various types of service. Another information source is the *Post Office Weekly Bulletin*.

(5) The sort racks, mail opening unit and packaging table as illustrated throughout this handbook are not necessarily standard items. They were evolved from experience and operational suitability.

MAIL ROOM WORK FLOW LAYOUT

PLATE V

Legend

A Chairs (upholstered stenotype)
B Electric time stamp
C Wrapping paper dispenser
D Tape shooter
E Mail bag holder
F Postal scale
G File cabinet (mail room records)
H Telephone table
I Sorting rack for grouping
   outgoing mail by post office
   requirements i.e. local, by
   province, foreign, etc.
J Letter opener
K Incoming mail pre-sort rack
   with base
L Mail manager
M Outgoing registered mail record
N Mail packaging counter
P Outgoing group mailing rack
   with base
Q Outgoing mail preparation counter
R Mail opening table with sort trays
S Access area to work stations
T Storage area (internal delivery
   vehicles)
U Storage area for outgoing mail
   bags and flatbed truck
V Incoming registered mail record
W Postage meter
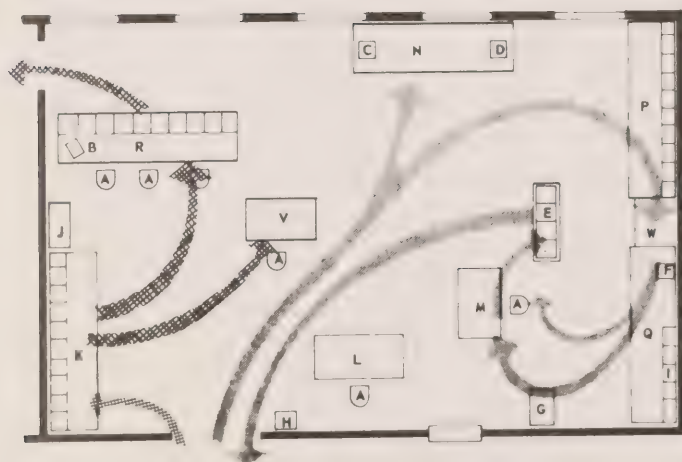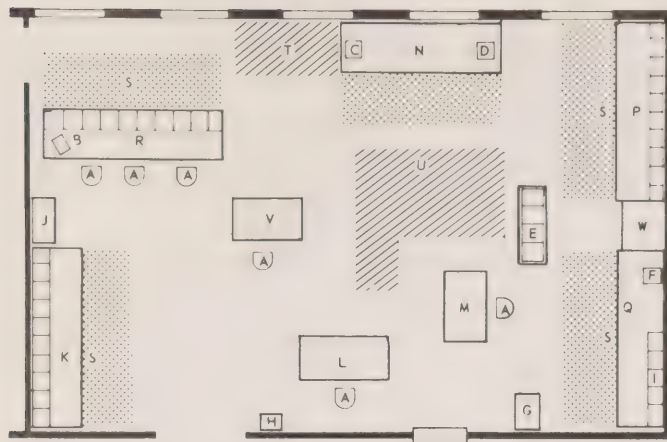
Outgoing mail operations

Incoming mail flow from
the post office

Incoming mail directed
for mail opening action and
delivery to the records
section

PLATE VI

PICTOGRAPHIC OUTLINE OF A SMALL MAIL ROOM
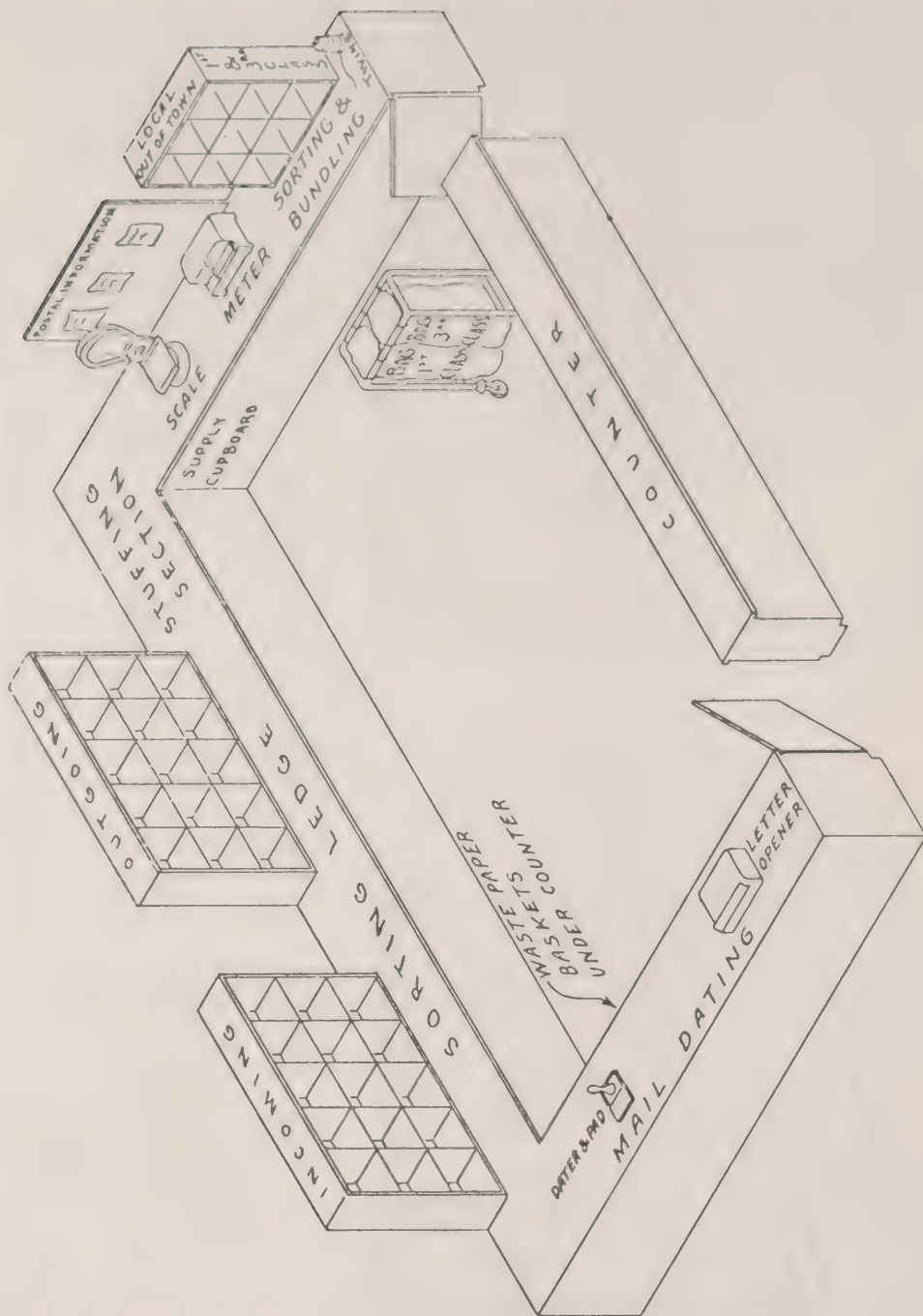
MODEL MAILING ROOM

Section 3 — Staff

1. **GENERAL**

The mail room provides an excellent training ground for new employees where they will be given an overall review of the total organization and the operations of a department or agency.

2. **THE MAIL ROOM MANAGER**

(1) In larger departments, the size of the operation will warrant a mail manager. In smaller organizations the function may be linked with other responsibilities within the Records Manager's sphere.

(2) The responsibilities of a Mail Room Manager will include all the mail handling operations and the organization and control of the messenger delivery services. To carry out these responsibilities, his qualifications should be such that he will have good staff management capabilities and he should be brought into departmental development and training programmes. While he will be assisted by lower grade supervisors in the performance of the actual mail room operations, such managerial responsibilities as the co-ordination of the various sections, the planning of the work flow, the devising, writing and issuing of instructions, and the introduction of procedural methods will rest with the manager. In addition, his ability to establish and conduct training programmes for his staff will determine to a great extent the continuous efficiency of the mail room service. The manager must entertain an overall knowledge of all operations, e.g. the processing priorities for departmental mail and the routing schemes for the various types of mail.

(3) The duties and responsibilities given in detail below represent a totality of a maximum requirement in a large department. Many other departments whose operations are smaller or more limited will only be required to assign the appropriate proportion to fit the circumstance. Under the general direction of the Records Manager:

    (a) performs the function of Mail Manager involving the management of the mail and messenger operations through the application of sound management principles in the

        (i) receiving, sorting, opening, routing, controlling, and distributing of incoming mail,

        (ii) collecting, sorting and distributing of internal mail, documents, files and other material throughout the working day, and

        (iii) collecting, preparing, sorting, controlling and dispatching of outgoing mail;

    (b) prepares procedural instructions and continuously reviews and revises such procedures to meet changing or expanding service requirements;

    (c) establishes and maintains scheduled mail delivery and collection services and regulates the use of departmental motor vehicles for the conveyance of mail matter, if these are used;

    (d) ensures that two persons are present during mail opening at all times;

    (e) establishes and maintains proper protective control over moneys and other negotiable valuables received in the mails by the use of accepted recording procedures as prescribed by the departmental Financial Officers and the Auditor General representatives;

    (f) prepares and issues circular letters on all mail and messenger services and corrects abuses of the efficiency of these services;

    (g) establishes and maintains a distribution section or centre supported by such aids as circulation-distribution lists for departmental material;

    (h) provides service for the preparation and dispatch of bulk items by rail, surface, air, express and freight for points in Canada and outside Canada and completes the required documentation;

(i)   reviews all mail room facilities and studies the possibility of introducing new equipment and investigating its useful and economical application for mail room operations;

(j)   conducts periodic detailed postage surveys for all mail classes and thereby determines annual departmental postage expenditures and prepares an annual postage forecast report for financial officers;

(k)   trains and evaluates the performance of mail room staff, counsels employees who present problems of work attitude and recommends disciplinary measures where necessary, maintains daily attendance, approves leave and plans holiday rosters;

(l)   interprets domestic and international postal regulations as they apply to government mails, maintains liaison with Post Office Department officials, and conducts postal inquiries with regard to irregularities and lost mail;

(m) applies and enforces security procedures and practices in the preparation and dispatch of outgoing classified information for transmission through domestic and international postal channels, and reports on security infractions revealed in the incoming mails;

(n)   interprets and applies the regulations of the Department of External Affairs in the receipt and dispatch of diplomatic mails, if applicable.

3. A MAIL SERVICES SUPERVISOR

The following set of duties for a position as described could be a requirement in a large department and the incumbent would be in the nature of an assistant to the manager. Under the direction of and responsible to the Mail Manager:

(a)   directs the sorting of incoming mail into two main primary categories:
     (i)   mail to be forwarded for direct delivery, and
     (ii) mail to be opened and processed by the Records Office before delivery to action offices;

(b)   ensures that two persons are present during mail opening at all times;

(c)   directs the mail opening clerks in mail opening, mail scanning and mail direction to the appropriate section of the Records Office for classification processing;

(d)   directs a check procedure for enclosures and ensures that such enclosures are properly secured to the covering correspondence without resulting damage;

(e)   directs the proper protective control procedures over incoming moneys and other negotiable valuables and duly record such items in a prescribed manner for delivery under signature;

(f)   directs the proper protective control procedures for processing incoming registered mail items, special delivery items and diplomatic mail, if applicable;

(g)   directs the re-direction of incoming mail actionable by other departments and agencies;

(h)   directs the receipt, sorting and preparation for dispatch of outgoing mail acceptable as mail matter within the classes described in the *Canada Official Postal Guide*;

(i)   directs the application of the proper mail classes on the covers of outgoing mail to ensure that correct postal handling is afforded to each class, and directs the sort of these classes into specific groupings as an aid to the Post Office Department:

(j)   directs the procedures for a bulk envelope mailing system;

(k)   directs the proper procedures for control of outgoing registered mail to the Post Office.

4. MAIL CLERKS

The duties and responsibilities for mail clerks are given in detail for both aspects – incoming mail and outgoing mail. The operations could be performed by the same employees in small departments but in a larger department the functions may require a more distinct split for efficient performance. Under direction of the Mail Manager and/or the Mail Services Supervisor:

Incoming Mail and Mail Opening

(a) sorts incoming mail into its two main primary categories:
- (i) mail for direct delivery action,
- (ii) mail for opening and forwarding to Records Office to be processed before delivery to actioning offices;

(b) opens and analyses information content and directs to appropriate Records Office section;

(c) checks for enclosures and ensures that these are properly secured to the covering correspondence;

(d) records moneys and other negotiable valuables received in the mails, signs the record to certify its accuracy and completeness, and ensures delivery under a signature receipt procedure to Financial Officers;

(e) receives and checks incoming registered, special delivery and diplomatic mails, if applicable, and maintains a receipt delivery system for these items;

(f) re-directs incoming items actionable by other departments;

(g) re-examines envelopes after opening and extracting material to ensure that all contents are removed;

Outgoing Mail

(a) receives, sorts and prepares for postal transmission all categories of outgoing mail acceptable as mailable matter within the classes described in the *Canada Official Postal Guide*;

(b) where a bulk or group mailing system is in use, checks loose mail to detect discrepancies in correspondence preparation, i.e. unsigned letters, misdirected mail and breaches of security, extracts such mail from the out-flow and returns to the originators for corrective action;

(c) determines and applies proper mail categories on covers of outgoing mail to ensure and aid in proper postal handling through the Post Office Department;

(d) sorts outgoing mail into provincial and other groupings as required by the Post Office Department;

(e) records and allocates registration numbers to outgoing registered mail and obtains signatures from the Post Office Department;

(f) completes necessary customs declaration forms for packages destined to addresses outside Canada;

(g) completes invoices and waybills required when dispatching bulk items via surface or air freight;

(h) prepares outgoing diplomatic mail in accordance with the regulations of the Department of External Affairs, if applicable;

(i) calculates postage expenditures for each class of outgoing mail when required to establish departmental postage costs.

5. MESSENGER AND DISTRIBUTION SERVICES SUPERVISOR

While in large departments it will be found necessary to provide for the supervision of the internal distribution and messenger delivery services, this may not be required as a separate function in smaller organizations. Whether this operation does or does not require a distinct separation of duties and responsibilities, they will be performed during the course of the daily work. Under the direction of the Mail Manager:

(a) supervises the sort-distribution system and the internal-external delivery system;

(b) controls the operations of the delivery messengers;

(c) supervises the care and custody of delivery equipment;

(d) maintains distribution lists for circulation of directives and instructions, etc.;

(e) maintains the distribution identifications of offices to be serviced;

(f) trains new staff and maintains a spot-check verification to ensure efficient service.

6. A MESSENGER (see also page 41, number 4)

Under the direction of the supervisor:

(a) removes and checks material for delivery from the distribution boxes;

(b) places material in compartments of the delivery vehicles;

(c) for internal delivery, transports material in manually operated trucks to addressee offices;

(d) for external delivery, loads delivery boxes on motor vehicle;

(e) delivers material at addressee points and picks up outgoing material;

(f) maintains the allotted delivery schedules;

(g) obtains receipts for registered and diplomatic mail and gives signatures for material picked up on the route;

(h) ensures safe handling of classified material while in transit;

(i) operates hand delivery vehicles with due care.

7. STAFF SCHEDULING

(1) Mail room staff schedules must be so arranged that staff is available prior to and after normal working hours, so that mail is ready for delivery early in the day, and so that outgoing mail is collected and dispatched at the close of the day's work as well as throughout the day. This principle requires that the staff be scheduled on a staggered basis to cover all the hours necessary.

(2) A portion of the staff should report for duty at least one-half hour in advance of the normal working hours for the department. This permits available mail to be delivered and to be on hand when departmental staffs begin work. Early morning back-logs may thus be avoided and staffs may begin their daily operations without delay. In addition, the problem of being "starved" for work on the part of the other members of the mail room and the records office is resolved.

(3) Likewise, some staff members must remain for at least one-half hour after the normal close of business for the departmental offices. This ensures that all mail for the day is included in the final mail without the problem of overload and rush situations which lead to poor mail handling.

8. **TRAINING**

(1) Present day mail room operations are basically manual and involve a considerable number of junior employees. These staff members should be given training in the broad departmental goals and objectives in addition to their specific job training.

(2) These employees should follow a training programme which will not only afford them the opportunity to progress through the various stages of increasing responsibility within the mail room, but which will also prepare them to qualify for more responsible positions in the records office or other departmental branches.

(3) Training programmes should include teaching in depth in all phases of mail handling and messenger services. Such training should include instruction in the proper preparation, classification and sorting of mail. It should also cover the rights, responsibilities and liability of employees in handling negotiable valuables. At the end of a complete training scheme, employees should have an intensive knowledge of all operations and a thorough knowledge of the Post Office regulations which directly affect government mails.

(4) When planning and establishing training programmes, the Mail Room Manager should take advantage of the facilities afforded by the Post Office Department. Post Office officials are prepared to assist in an advisory capacity in setting up training plans for the processing of mail and in providing literature and other training aids.

9. **JOB KNOWLEDGE QUESTIONNAIRE**

This questionnaire is provided as an example of a method whereby the mail manager can assess the progress of trainees or re-assess the operating knowledge of trained staff. Part "A" covers items dealing with incoming mail while Part "B" deals with outgoing mail. The fact that a certain question is asked does not necessarily mean that the procedure is desirable or correct.

PART "A"	INCOMING MAIL OPERATIONS	True Yes	False No
1. The primary sort of incoming mail is to separate it into two categories:			
(a) mail to be opened?			
(b) mail for direct delivery?			
2. In sorting incoming mail, do you guess what is to be opened?			
3. When an item of mail is received in damaged condition the mail clerk will:			
(a) disregard its condition?			
(b) ensure that all attachments are received and note on the outer wrapper that it was received in damaged condition?			
4. Is the purpose of the mail opening unit to:			
(a) open the mail?			
(b) open, extract and direct contents by subject to respective records office?			
5. When a valuable is found on opening mail, the clerks will:			
(a) secure this to the covering letter and forward to the records office?			
(b) take the valuable with supporting correspondence immediately to the Financial Office?			

	True Yes	False No

(c) place valuable in its original cover with the correspondence, record all necessary data? ____ ____

(d) place valuable in its original cover with the correspondence, note all necessary data thereon and pass to the special clerk? ____ ____

6. In obtaining signatures for valuables entered in a record system, it is imperative that legible signatures be given? ____ ____

7. Incoming Registered Mail can be receipted by:

    (a) any employee of the department? ____ ____

    (b) any employee of the Mail Room? ____ ____

8. Internal receipt records for incoming Registered Mail are retained for:

    (a) six months? ____ ____

    (b) two years? ____ ____

9. Initials in lieu of complete signatures are acceptable in receipting registered mail? ____

10. In transmission between the Mail Room and offices, valuables together with the Cash Blotter will be carried in another container? ____ ____

11. When correspondence is received stating that some type of valuable was enclosed but in fact was not received, the mail opening clerks will note the letter and envelope to this effect? ____ ____

12. Should the clerks who are charged with the care and custody of valuables also sign such a letter and envelope as mentioned in question 11? ____ ____

13. When time-stamping special items the stamp may be placed anywhere on the item? ____ ____

14. In every instance where it is necessary for the Mail Room to sign for some incoming mail, a record of its disposition will be maintained? ____ ____

PART "B"   OUTGOING MAIL OPERATIONS

1. Can fourth Class Mail be registered? ____ ____

2. Can Third Class Mail be registered? ____ ____

3. Is it permissible to send a parcel post package to the United Kingdom or the U.S.A. as special delivery? ____ ____

4. Is there "Air Parcel Post" service to the U.S.A.? ____ ____

5. The sealing flap of a registered letter may be sealed with cellulose or gummed paper tape? ____ ____

6. When a piece of loose correspondence has not been clearly identified to a field office, the mail clerk shall:

    (a) determine by the text what field office is involved? ____ ____

    (b) extract the letter and bring to his supervisor? ____ ____

	True Yes	False No
7. Customs declaration forms are required for parcel post packages addressed outside Canada?	____	____
8. Is the *Canada Official Postal Guide* published by the Post Office Department?	____	____
9. Should large amounts of registered mail items be brought to the attention of the supervisor?	____	____
10. When a piece of loose correspondence is received bearing a "Registered Mail" annotation, the mail clerk should:		
(a) process in the usual manner for ordinary mail?	____	____
(b) immediately extract the item and place with the registered mail unit?	____	____
11. When "Special Delivery Service" is requested, the mail clerk shall process without delay for that service?	____	____
12. No daily record need be made or kept for the cost of outgoing mail?	____	____
13. A registered serial numbering system is maintained in order to know the number of registered items mailed?	____	____

10. SECURITY

(1) General security as applied to mail rooms will vary between departments depending on the functions and policies of the individual organization. The extreme need would be where the physical security of the mail room requires that the area be under an electronic alarm system. Whether this extreme requirement is essential or not, each department should develop a security system for the mail room operations which will meet that department's standard.

(2) Unauthorized persons should not be given access to, and in particular must not be allowed in, a sensitive area such as the incoming registration and incoming valuables section. Where a department handles diplomatic mail the same principle applies.

(3) Classified items in the course of delivery by messengers must be protected at all times and not unduly exposed to the chance of pilferage or tampering. Where security classified material is handled in large volumes, special equipment that can be adequately secured should be used.

(4) Messengers on delivery routes must not leave delivery vehicles unattended for any period of time. Call stations should be so planned and arranged that a minimum of time is spent in offices in delivering and collecting mail.

(5) While classified mail is required to be identified as such on an inner covering envelope or wrapping, in some instances it may be received without such identification. This is a breach of security regulations and any instance must be brought to the attention of the manager who will report to the proper departmental officer. Every effort must be exercised to ensure that the security breach is not repeated.

(6) In general, incoming security classified material will adhere to the normal regulations. On occasion, a mail opening clerk will inadvertently open a classified item. If this happens, the envelope or wrapping must be resealed and the item processed through to the section of the Records Office where classified material is handled. This breach must be brought to the attention of the employee to avoid repetition of the error.

(7) For specific security regulations, the mail manager should know the departmental security regulations. If these do not exist, then the operating authority is the publication *Security of Information in the Public Service of Canada, November, 1956.*

11. CHECKLIST FOR A MAIL MANAGER

The mail manager may find that this check-list will reveal what has been omitted in organizing a departmental mail room or in a periodic review of the operations of an established mail room.

(1) Is there a written plan for the future development of the mail room?

(2) Has this plan been reviewed during the last six months?

(3) Is there a departmental manual showing the duties, responsibilities, and detailed operating procedures for the mail room?

(4) Is there a departmental manual showing the responsibilities of originating offices with respect to the mail function?

(5) Is there an organization chart of the mail room? Is it up-to-date?

(6) Has each employee in the mail room been provided with a written outline of his duties?

(7) Have all activities been co-ordinated where possible?

(8) Have all controls been checked as to their effectiveness and their necessity within the last year? e.g. registered mail.

(9) Have all procedures been reviewed in the last year?

(10) Is there a work-flow chart of the mail room operations?

(11) Has the possibility of new equipment been reviewed with supporting data accumulated?

(12) Have staff been scheduled properly to ensure timely delivery to actioning offices?

(13) Are steps taken to keep "PERSONAL" mail to a minimum?

(14) Is time and date stamping limited to essential mail only?

(15) Is there a system for the control receipt of valuables?

(16) Is all mail delivered at the end of the day?

(17) Is outgoing mail picked up progressively during the day?

(18) Is such mail delivered to the Post Office progressively during the day?

(19) Is a bulk envelope system used?

(20) Is a group sort system used?

PART II

OPERATING THE MAIL ROOM

Section 1 – Incoming Mail

1. **GENERAL**

   (1) Operating a mail room is not as simple as its basic components of receiving, delivering and sending would seem to imply. Even the best operated mail room calls for continuous vigilance whereby improvements may be adopted. Urgent correspondence or internal memoranda may be delayed on occasion because of a minor breakdown in one of the three areas of operation.

   (2) Since the primary purpose of a mail room is to process mail as fast as possible, there should be a minimum of processing steps consistent with good mail handling practices and sometimes with proper security considerations, while costs must also be kept in mind. For example, in many cases first class mail will possibly arrive and be delivered as soon as, if not ahead of, registered or special delivery mail without the added expense of these two particular methods of transmission.

2. **RECEIPT FROM POST OFFICE**

   In Part I the matter of scheduling the mail room staff so that some employees commence the day's operations ahead of the normal working hours was discussed. This commendable practice will be fruitless unless the motor vehicle collecting the mail from the Post Office begins its job at a time whereby the mail will be received in the mail room to match the starting time of the mail room advance staff. This principle applies in either case whether the mail is collected by a departmental vehicle or through a private mail delivery contract.

3. **EMPTYING MAIL BAGS**

   On receipt of the mail from the Post Office and its conveyance from outside to the mail room, each mail bag should be emptied onto the counter-top portion of the sorting racks. The emptied mail bag should then be thoroughly examined to ensure that no mail item has been left inside the bag inadvertently. If the working counter-top area permits, more than one bag may be emptied at the same time but an excessive amount of material will only slow down the sorting operation. The mail bags which have been emptied and re-examined should then be folded and placed under the sorting rack counter-top as indicated at Plate VII.

4. **PRIMARY SORT**

   (1) As the mail is cleared progressively from the mail bags, a primary sort will normally be required:

       (a)   mail to be delivered direct; and

       (b)   mail to be opened before delivery.

   (2) There may be various reasons why certain types of incoming mail should be delivered direct without opening. There will be different causes for this procedure dependent upon varying structures, functions or peculiar requirements of the particular department. Some of these considerations will include the fact that the mail is:

       (a)   addressed to the Minister or the Minister's Office which is serviced by a special sub-records office where the mail is given further processing;

PLATE VII

PRIMARY or INTRADEPARTMENTAL MAIL SORTING RACK

LABELLING STRIPS

ADJUSTABLE COMPARTMENTS FOR OPTIMUM REQUIREMENTS

(ADEQUATE WORKING SURFACE)

STORAGE AREA FOR EMPTY MAIL BAGS AFTER EXAMINATION

PLATE VIII
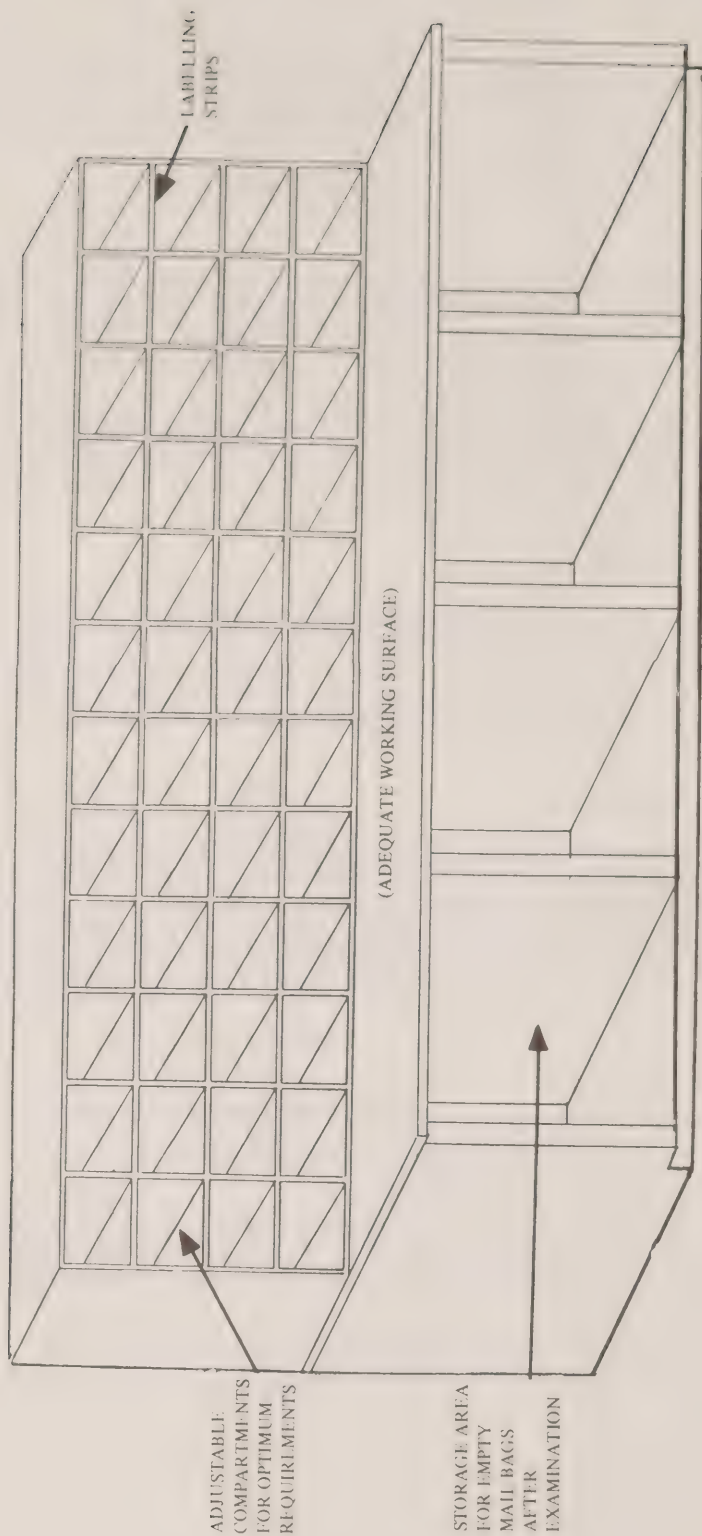
SORTING THE MAIL
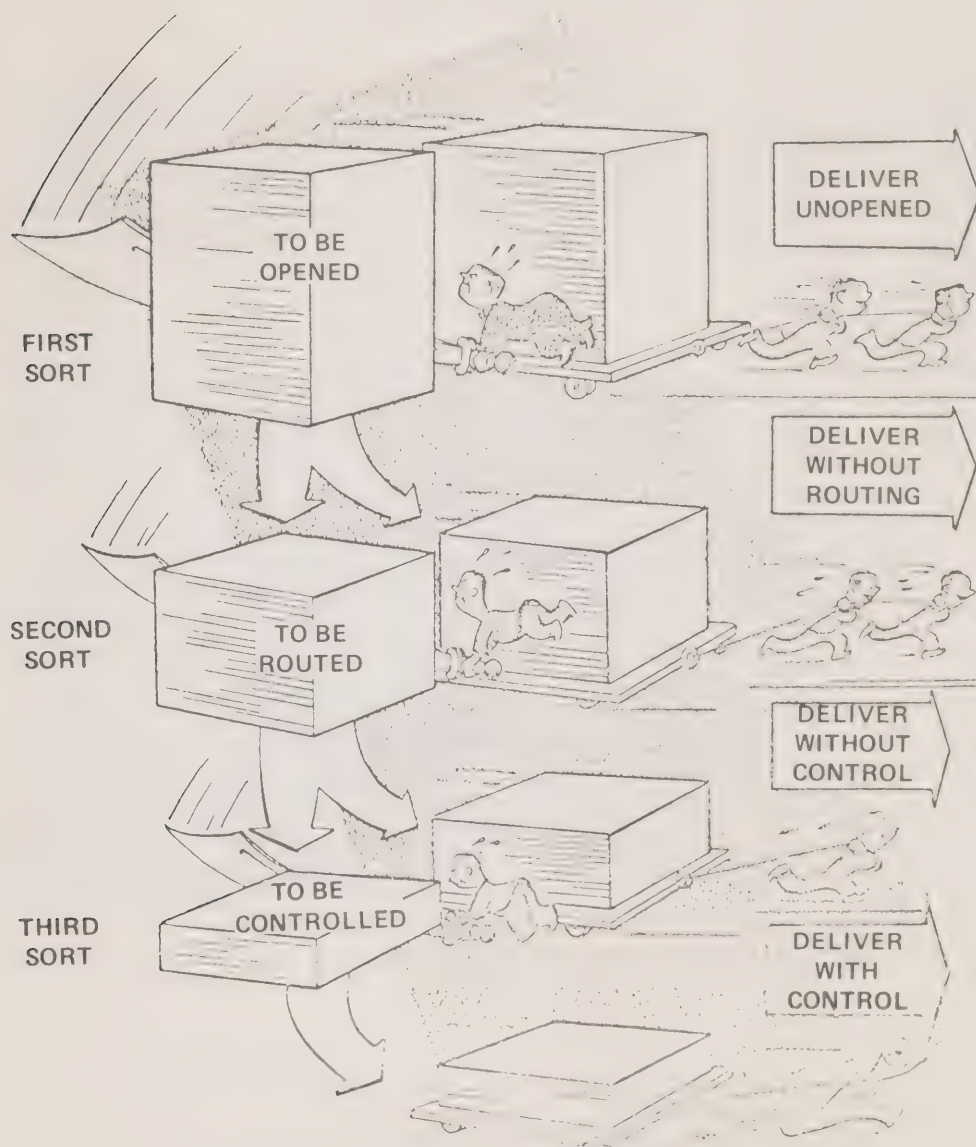
(b)   addressed to an office which is serviced by other specific sub-records offices on a branch or other basis where the mail will be opened and processed as required, this could include security classified matter as well;

(c)   received in error at the department;

(d)   addressed in a specific manner for instant identification in the mail room and agreed upon between the office of such identification, the Records Manager and appropriate Financial Officer that such material shall be delivered unopened;

(e)   personally addressed to an individual; and

(f)   *personal* mail.

(3)   With regard to personally addressed mail, there is a fine distinction between such mail and *personal* mail. In either event, both should be discouraged. Official mail should be addressed to the position and not the person because the sender of the communication is entitled to assume that it will be dealt with promptly by the proper person responsible for performing the appropriate function. On the other hand, he is not entitled to try to choose who will be the appropriate person to deal with it. This is no more than the old and tried business principle — "Address the firm — not individuals".

5.   PERSONAL MAIL

There is a special problem concerning *personal* mail. In departments where there may be a constant rotation of staff posted to the headquarters offices, it is both practical and normal to permit the use of the departmental address for the receipt of personal mail for a period of time. However, with the support of senior management, this can be controlled by the use of a small slip which can be stapled to the envelope containing such advice as:

"The department discourages the receipt of personal mail. Official mail should be addressed to the position and not the person. Other arrangements should be made as soon as possible for the receipt of purely personal mail".

6.   PRIMARY SORT — JOB OPERATING PROCEDURES

These job operating procedures are given as a typical description of the procedural steps involved in the primary sort of incoming mail:

Step 1 —   Empty the mail bags onto the primary sort counter top of the sorting racks.

2 —   Determine by a thorough examination that each mail bag is completely empty.

3 —   Fold the empty mail bags and place in the appropriate storage space beneath the counter top.

4 —   Extract the large envelopes from the tied bundles of small envelopes.

5 —   Sort mail in prescribed categories as applicable to the particular department which may be divided into at least three normal separations,
(i)   mail to be delivered direct to the indicated addressee,
(ii)   mail to be delivered to the specific records office for opening and processing, and
(iii)   mail to be routed through the mail opening station within the mail room for further processing.

6 —   Take the envelopes identified as in category 5(iii) to the mail opening station.

7 —   Repeat Steps 5 and 6 for the small bundled envelopes.

8 – Repeat Steps 1 to 3 for mail bags containing material other than envelopes, i.e. parcels, newspapers, periodicals, etc.

9 – Sort this material for direct delivery.

Plate VIII illustrates the principles of sorting incoming mail and Plate IX provides a view of one primary sort operation in a large department.

A PRIMARY SORT STATION   **PLATE IX**

7. **REGISTERED INCOMING MAIL**

(1) The importance of this type of mail and its handling procedures require special emphasis. Each mail room should institute a system to record and process the receipt of the registered mail. The size of the registered mail room unit and the procedures used will depend on the volume of registered items handled.

(2) The registered mail unit should be the responsibility of one specific employee who has been assigned registration duties and is accountable for the efficient operation of the unit including each individual registered item. Dependent upon volume, these duties may account for all of this specific employee's working day but, if this is not the case, then the added responsibility of the receipt and handling of valuables may be added to round out one complete responsibility. As an alternative, other more routine duties may be assigned on the primary and emphatic understanding that the registered mail has priority.

(3) The mail clerk must check each item against the "Registered Letter Bill" entries made by the Post Office Department to ensure that all are accounted for, and that only registered items for the department are accepted. If a shortage appears in the number of items received or there is any other discrepancy, such as a difference between the registered numbers on the bill and the numbers on the items received, the Post Office should be immediately informed so that corrective action can be taken at once or an inquiry started for cases which cannot be resolved at the immediate time of discovery of the discrepancy.

(4) In general, the sort procedure is similar to that for ordinary incoming mail except that signatures are received for items as they are delivered to the various addressee offices. Receipt forms are completed for each address office listing all the registered items for that office. A sample form with its entries completed is shown at Plate X. Delivery to addressee offices will then be effected through the departmental mail room messenger service.

(5) Valuables found contained in registered envelopes which require to be opened in the registered mail unit should be handled as outlined in number 9 page 29. An entry is made on the incoming receipt bill that particulars of delivery will be found in the cash blotter.

(6) Disposal records in the shape of receipted delivery forms must be retained in accordance with the *General Records Disposal Schedules of the Government of Canada*.

8. **REGISTERED INCOMING MAIL – JOB OPERATING PROCEDURES**

Step 1   The authorized registered mail clerk receives the registered mail from the Post Office Department.

     2 – The total number of items are checked against the total shown on the Registered Letter Bill.

     3 – The registered numbers on the items are checked against the registered numbers listed on the registered Letter Bill.   *OR*

     4 – Where registered mail is received in locked or sealed bags, it is signed for by the authorized mail clerk as a bulk item.

     5 – Then follow Steps 2 and 3 above after opening and emptying the bag(s).

     6 – Any discrepancies in the number of items or in the registered numbers will be reported to the supervisor who will immediately take inquiry action with the Registration Division of the Post Office.

     7 – The registered mail clerk signs the Post Office bill copy.

     8 – The registered mail clerk and another person will open all registered items which do not have to be forwarded unopened to a sub-records office or designated unit. All registered mail will be opened by two persons in the mail room or sub-records office.

     9 – Receipt delivery forms are filled out for each delivery point listing the items as in the sample completed form at Plate X.

10 – The registered items with their receipt forms are given to the mail room messenger service for delivery.

11 – The signed returned forms are brought back to the registered mail unit after delivery.

12 – The receipted forms are retained for one year as required by the *General Records Disposal Schedules of the Government of Canada*.

A RECEIPT BILL SAMPLE   PLATE X

RECEIPT BILL – FEUILLE DE RÉCEPTION

Received from or delivered to – Reçu de ou livré à		Date:
Personnel Division		*Jan 2, 1979*
Item number numéro de l'article	Description	Origin Origine
Reg'd 123	*Mr. J. Armstrong*	*Montreal, P.Q.*
" 456	*Mr. R. Robinson*	*Vancouver, B.C.*
" 789	*Mr. T. Williams*	*Toronto, Ont.*
Date received – Reçu le *2/1/79* (date)	Received by – Reçu par *H. G. Jarvis*	

1. This form is simple in design and can be economically printed.

2. It may be used by Mail Rooms for recording and obtaining signatures for registered and other by hand articles of mail.

3. Some departments in lieu of this form use bound or loose leaf type books. The risk here is that if the book or loose leaf binder became lost several earlier recordings would be lost whereas the use of the single sheet form such as above reduces the loss to one or two entries.

9. **INCOMING VALUABLES**

(1) As in the case of registered mail, the responsibility for the recording and handling of incoming valuables should be assigned to one particular staff member. In many departments, this duty could be included with the duties of the registered mail clerk. However, in some departments where large amounts and volume are received regularly, it may become a requirement to assign this operation to a specific employee other than the registered mail clerk.

(2) Incoming valuables include such instruments as:

(a) cheques;

(b) postal notes;

(c) money orders;

(d) bank drafts;

(e) cash;

(f) unused air, rail, etc. tickets;

(g) etc.

The general rule concerning valuables made out as payable to the "Receiver General of Canada" is that they will be forwarded to the Financial Office.

(3) A record of receipt must be made and maintained for future reference and for the protection of the mail clerk handling these incoming valuables. This record of receipt should be done through a Cash Blotter system and it will contain the following minimum elements of information:

(a) date of the entries made;

(b) name and address of the remitter;

(c) type of valuable and its number;

(d) amount of the valuable;

(e) date of covering letter;

(f) reference number or subject note;

(g) clerks' initials;

(h) delivery office designation;

(i) messenger's initials; and

(j) delivery office signature of receipt on delivery.

(See Plate XI)

(4) The valuables should then be securely attached to the related correspondence and taken with the Cash Blotter to the office concerned where a signature of receipt is obtained. By a method of counter-initialling, the delivery operation can be done by the established messenger service.

(5) Any remaining valuables which could not be delivered during the working day for that day should be kept under lock and key.

10. INCOMING VALUABLES—JOB OPERATING PROCEDURES

These job operating procedures cover the care and custody of incoming valuables from the point where valuables are found on opening an envelope and continue throughout the remaining steps of the operation:

At Mail Opening Station

Step 1 Two persons will attend to the opening of mail at all times. When an envelope is opened which contains any valuables, hand over the valuables with its covering correspondence to the special clerk.

2 — This special mail clerk will enter the amount in the Cash Blotter immediately.

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PLATE XI

3   The clerk who opened the envelope will initial this entry of amount immediately. In the event that the amount entered is struck from the cash blotter the reason for this action will be indicated opposite the entry and initialled by both the mail opening clerk and the special clerk.

At the Cash Blotter Station (Note: This may be a combined Registered Mail operation station)

Step 1 – Periodically throughout the day, and timed to coincide with the messenger service schedule, the special mail clerk will recheck the items received against the amount entries and then complete the remaining Cash Blotter entries. See number 9(3) page 30 for typical details. See also Plate XI.

2 – The special mail clerk will initial all the entries as one group before passing the material to the messenger. Wherever possible, the special mail clerk should deliver the valuables to the accounting office.

3 – The messenger assigned to make the delivery will counter-initial beside the initials of the special mail clerk.

4 – The material and the Cash Blotter will be placed in a large envelope (or other suitable container) and addressed for delivery action.

5 – Delivery will be made immediately thereafter by the messenger who obtains the payee's signature on delivery.

6 – On return of the messenger to the mail room, the special mail clerk will check the Cash Blotter to ensure that all entries are properly signed so as to confirm delivery.

7 – At close of work daily, any undelivered valuables and the Cash Blotter will be placed under lock and key by the special mail clerk.

8 – Cash Blotter forms, when completely filled, will be retained for six (6) years after the date of the last entry group, as required by the *General Records Disposal Schedules of the Government of Canada*.

Any valuables which might have been received in unopened mail forwarded to a Records Office should be returned immediately to the mail room and handled in a similar manner. While it may seem that this system is too elaborate, it is designed to protect the employees handling valuables as well as the valuables themselves.

11. DIPLOMATIC MAIL (If applicable)

(1) The processing procedures for incoming diplomatic mail are essentially the same as for incoming registered mail. For general information, prior to the pick-up of diplomatic mail from the Department of External Affairs, all such mail (normally security classified material) is sent via "Diplomatic Bag" from Canadian overseas posts to the Department of External Affairs in Ottawa. These diplomatic bags are opened in that department's mail room. Items addressed to a particular department are listed on External Affairs receipt bills and a signature is obtained on delivery to each department concerned.

(2) On receipt from the Department of External Affairs, each item shown on that department's receipt bill is re-entered on the receiving department's own receipt bill system. This procedure is the same as for incoming registered mail. In both cases the main consideration is a receipt system to ensure the proper control protection until the final delivery to the correct addressee.

Section 2 – Mail Opening

1. **GENERAL**

   (1) Mail, other than registered, diplomatic and special items, may be referred to as ordinary incoming mail. Such mail is opened after the primary sort has determined that this is a requirement, and the opening operation will be performed at the mail opening station or unit (see Plate XII).

   (2) This phase of the incoming mail operations is important in that it serves as the feeder system which supplies the remaining undelivered material to the records offices for processing. Secondly, whether material does not require further processing can only be determined after the envelopes are opened at this unit. Any mis-direction at this point causes delay in ultimate delivery.

2. **SIGNIFICANT POINTS**

   (1) A quick scanning procedure should be used to ensure that the material should be opened. All envelopes of a similar size should then be collated together.

   (2) An electric letter opener should be used to open large volumes of envelopes and such openers are available for both small and large size envelopes. They will not mutilate the contents when care is exercised in their use.

   (3) After the envelopes are opened, the contents are removed and the appropriate records office determined through scanning for such guides as:

       (a) a file number reference, or

       (b) a source indication, or

       (c) a departmental office designation, or

       (d) the subject content which will provide a guide line where all others may be absent.

   (4) The correspondence must be screened for any mention of enclosures. If it refers to attachments which were supposed to accompany the letter but which are not enclosed, the original container should be rechecked thoroughly. A rubber stamp should be applied at a suitable place and initialled by the mail opening clerk when the recheck does not produce the attachment referred to (see Plate XIII). This stamp provides for this eventuality or other cases which constantly arise in a mail room.

INCOMING MAIL CONDITION STAMP SAMPLE   PLATE XIII

RECEIVED FROM POST OFFICE IN:

☐ DAMAGED CONDITION:

☐ OPENED CONDITION:

☑ WITHOUT ENCLOSURES:

☐ NO CONTENTS:

MAIL CLERK'S INITIALS: *a.B.l.*

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PLATE XII

INCOMING MAIL OPENING AND DISTRIBUTION UNIT

LINEDEX STAND WITH
WORKING PROCEDURES
SPECIAL INSTRUCTIONS
ROUTING DATA, ETC

RECORDS OFFICES & OTHER DELIVERY POINTS

CHAIRS

DRAWERS FOR
MAIL OPENING
NEEDS

TIME STAMP

ELECTRIC
LETTER
OPENER

STORAGE AREA
FOR EMPTY
ENVELOPES,
ETC.
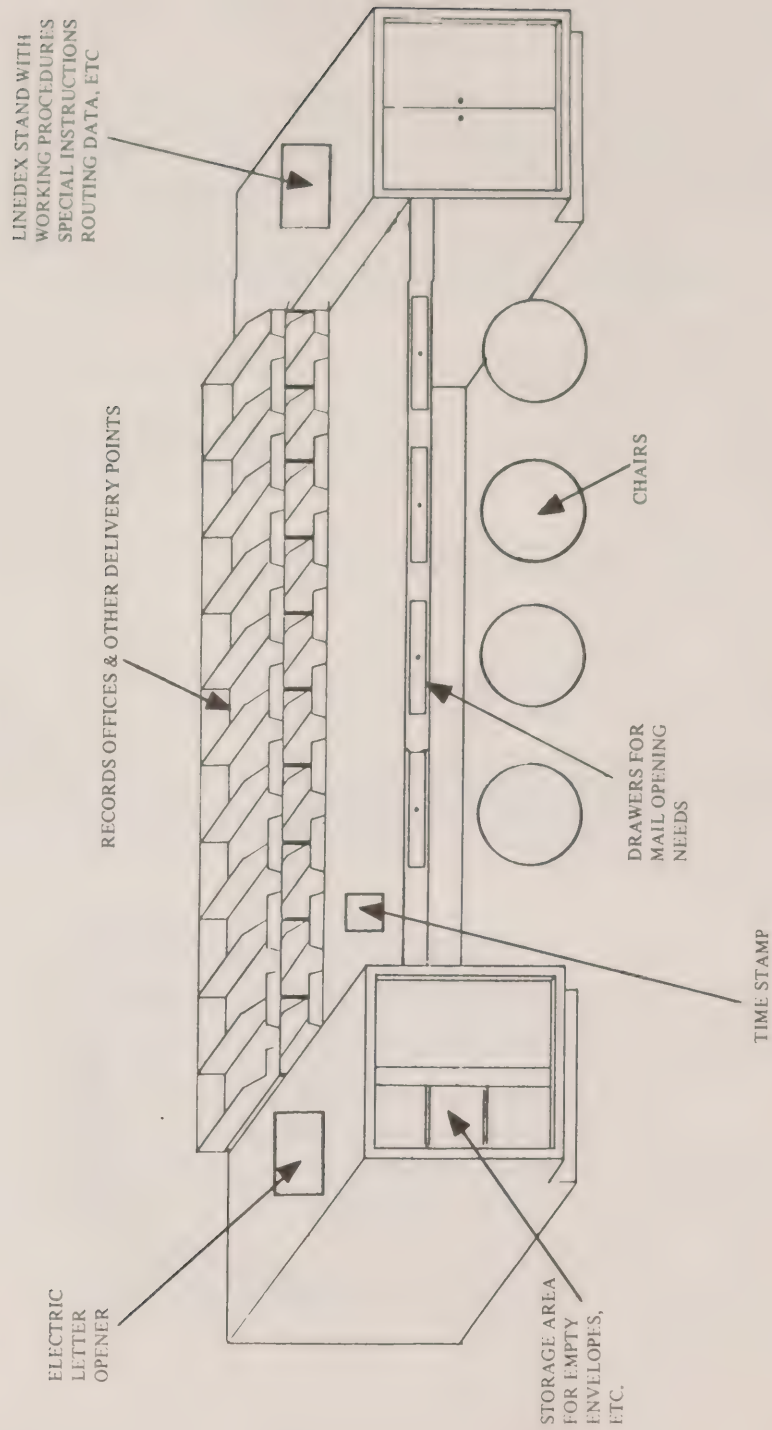
(5)   Enclosures which are other than typed or printed papers and which are usually originals such as:

   (a)   birth, death, marriage and education certificates;

   (b)   film negatives;

   (c)   plans, drawings, etc.,

should not be attached to the covering correspondence by a wire staple. They should be placed back into the incoming container and the correspondence then stapled to this container so that the staple will not pass through the attachment. Special care should be taken for enclosures because they may not be the property of the department or the government but the private property of an individual who has the right to expect its return, if this is applicable, in good condition.

(6)   Correspondence from private citizens requesting information should be screened with care to ascertain that a return address is on the letter. When there is no address shown, then the covering envelope should be attached to the correspondence.

(7)   The contents of envelopes or small packets which are not subject to Records Office procedures should be forwarded direct to the applicable office. Such material will include:

   (a)   vouchers;

   (b)   receipts;

   (c)   returns; and, normally,

   (d)   other matter not accompanied by a letter.

(8)   Security classified mail is identified on the inner envelope and such mail should be forwarded unopened to the records office for the required processing. Occasionally, classified mail is received and not so indicated. These cases are a breach of security and must be brought to the attention of the supervisor who will take the required action to report the incident.

(9)   After all envelopes, etc. have been opened and sorted at the mail opening unit either for the records office or the actioning office, all mail is then collected and delivered by the messenger service on its scheduled route times.

3.   ROUTING OF MAIL OPENED

(1)   The routing of opened mail has already been covered in the preceding paragraph but this point is restated here in summary form. Mail which is not delivered at the primary sort station is passed to the Mail Opening Unit. It is opened either by hand or by a mechanical letter opener.

(2)   On opening, it is determined that the mail should be:

   (a)   delivered direct because reference to files is not a requirement; or

   (b)   delivered to the Records Office for subject classification and/or file processing.

(3)   Mail which is to be forwarded without reference to the Records Office is immediately sorted to the mail opening trays designated for that purpose, while the other mail for the Records Office is sorted to other mail opening trays so identified (see Plate XII).

4.   FOREIGN LANGUAGE MAIL

Incoming letters in a language other than the two official languages of English and French should not be directed for delivery until they have been translated. Where there is no capacity of handling foreign language translations, documents may be referred to:

   Translation Bureau,
   Secretary of State Department,
   Ottawa.

5. MIS-DIRECTED MAIL

Frequently correspondence is received addressed to a government department requesting information or services which are in fact provided by some other department. Rather than returning the letter to the sender, the letter should be re-directed to the appropriate department which can deal with it, and the sender advised of this action. This could be done by the use of a suitably pre-printed post-card.

6. OPENED ENVELOPES

Mail opening clerks should ensure that all envelopes which have been opened are carefully examined during the process. This is to be certain that all material has been extracted. Opened envelopes should be retained for a short period only in case some reference is required. After retaining them for 24 or 48 hours they should be disposed of except for large envelopes which could be re-used inside the department *by crossing off the original addresses.*

PLATE XIV   MAIL OPENING
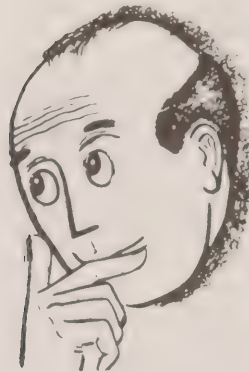
The routing puzzle – who should handle this ? ? ? ? ? ? ? ? ? ? ?

7. TIME STAMPING

(1)   Indiscriminate time stamping of incoming mail is unnecessary. Time stamping in the past was used as a check system, whereby the volume processed could be easily ascertained, or as a means to show when a document had been received and opened in the mail room. Adequate supervision and periodic spot-counts will provide this information, when required, at less cost.

(2)   However, if the time of receipt has some legal significance, as in the case of contracts and tenders, care should be taken to ensure that only such mail is time stamped.

8. MAIL OPENING AIDS

The mail opening operation should be equipped, where volume dictates, with the following devices to assist the staff in the performance of their duties:

(a) table sort bins or racks;

(b) electric letter opener for both small and large envelopes;

(c) electric stapler; and

(d) assorted rubber stamps either singly or in a multiple style as shown at Plate XIII.

PLATE XVI   AN ELECTRIC MAIL OPENER

Photo courtesy Pitney – Bowes Canada Limited

9. MAIL OPENING – JOB OPERATING PROCEDURES

Step 1 – Check-scan addresses before opening.

   2   Collate envelopes into uniform sizes.

   3 – Pass groups of uniform size envelopes through the electric letter opener or open by hand (e.g. if no mechanical opener or if bulky items).

   4 – Extract contents from envelopes at the mail opening station individually.

   5 – Identify, where required, that there is a return address.

   6 – Determine whether or not there is an enclosure.

   7 – If so, secure enclosure to the correspondence or replace in the original container and secure this to the correspondence.

   8   If there is no enclosure but there should be, apply appropriate stamp with this information and initial.

   9   Repair any damaged mail received by suitable tape and apply appropriate stamp with this information and initial.

   10   Process any valuables enclosed as detailed at Part II, Section 1, number 9.

   11   Scan material to determine whether it should be sent to the Records Office for processing or whether it may be delivered direct.

   12   Place material opened into respective sort rack trays at the front of mail opening station unit.

Any bulky envelopes should be opened by hand to prevent damage to the contents and to the electric letter opener, if one is in use. The above procedures apply equally within a Records Office for mail received unopened from the mail room.

Section 3 – Messenger Services

1. **PURPOSE**

(1) Since the messenger services are a vital segment in the total procedures designed to place incoming mail on an action desk as fast as possible, the delivery aspect of mail should be reviewed periodically with the intent of improving deliveries and preventing delays.

(2) The mail manager must know his department's requirements for frequency of service. He must determine the number and location of the delivery points or "call stations", the flow pattern for the routes, the volume handled, work priorities, the demand for special service and other relevant information. Mail must be delivered and collected on set schedules and defined routes so that the service will not interfere with other office work nor cause delays in handling.

(3) On the other hand, in TB529343 of April 1, 1958, dealing with the matter of registered mail, the Treasury Board also commented upon wastage arising from the abuse of messenger services. An extract reads:

" . . . . departments also might examine their present practices on the use of messengers for delivery of letters and other documents. Certainly our experience in the Treasury Board is that many documents are delivered to this office which just as easily could have been dispatched through ordinary Post Office channels. As you will appreciate, delivery by hand of documents not of an urgent or secret nature results in a waste of manpower and unnecessary expenditures.".

2. **PRINCIPLES OF A MESSENGER SERVICE**

(1) A delivery point or "call station" is a clearly designated area for the delivery and pick up of mail, documents and files. Each call station should have separate marked receptacles for the "IN" and "OUT" material. The call station for each office should be near the entrance to that office.

(2) Thereby, messengers will be able to service call stations quickly and efficiently with a minimum of delay in each office. They must not be expected to undertake added special errands for these offices.

(3) The delivery routes should be planned and laid out in as direct a route as possible without the need to retrace. Scheduled times of delivery for each call station should be established and the service must conform to the set times. Proper scheduling and routing will avoid the need for any special demands on an individual basis for messenger service.

(4) A list of call stations with their call times should be printed and posted for the information of all concerned. However, the messengers should be given some responsibility and authority to make adjustments of a temporary nature when this becomes an obvious requirement due to some special circumstance.

(5) Where material for a call station already serviced on the route is received at a later station, this should be carried back to the mail room for delivery on the next scheduled trip. Backtracking should be avoided.

(6) Several offices may be conveniently grouped into one single call station. This will prevent an unnecessary number of call stations within a small area.

(7) Where volume warrants, the messenger service should be equipped with a suitable type of mail cart. It should be provided with adequate facilities to handle the volume of mail encountered. For security material locked containers may be required.

(8) As part of their routine duties messengers should be trained to check each compartment of their delivery cart between each scheduled trip to ensure that no items have been overlooked. This verification

PLATE XVII

MESSENGER ROUTES

MAIL —

AN UNORGANIZED MESSENGER SERVICE WITHOUT PLANNED

ROUTES RESULTS IN POOR SERVICE
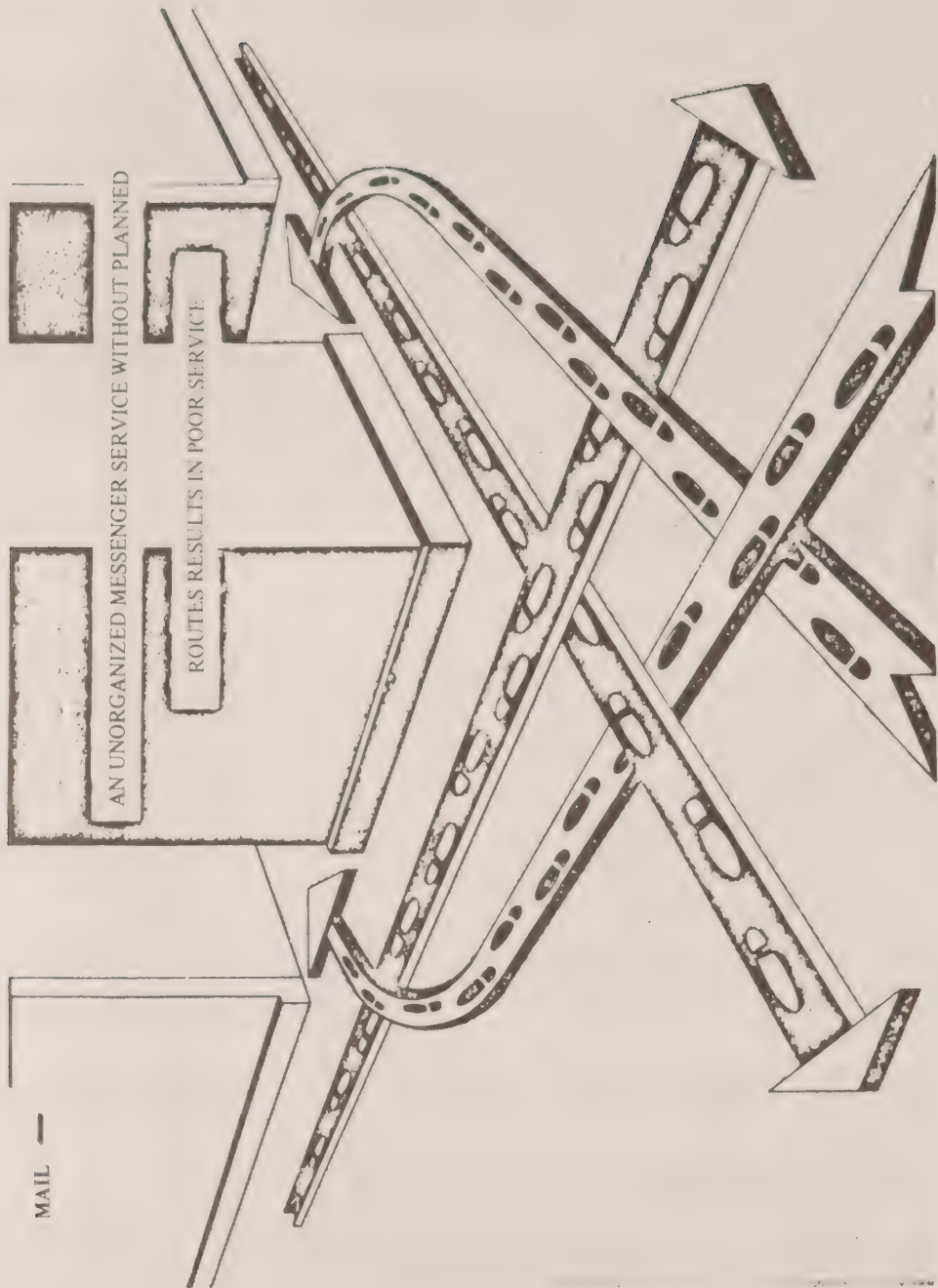
check system may also be a requirement for large volume deliveries. In this way, the material is checked as it is withdrawn from the sort racks to verify that the sort has been correctly performed in the first instance. Errors in sorting should be brought to the attention of the supervisor.

(9) The entire messenger system should be regularly reviewed to try to improve the service and eliminate any noted problems. Changes in the locations or changes in the organization of various offices will require changes in the route schedule and the location of the call stations.

3. MESSENGER DELIVERY OF REGISTERED AND OTHER SPECIAL MAIL

(1) Registered, diplomatic or other mail requiring a receipt signature on delivery becomes an added responsibility while the material is in the messenger's custody during delivery. Therefore, the protection of such material becomes of personal importance until he is released from this responsibility by obtaining the necessary signatures.

(2) Under no circumstances should material requiring a receipt be left at a call station unless it has been signed for.

4. MESSENGERS – JOB OPERATING PROCEDURES

Step   1 – Remove material in the route sequence from the compartments of the sort racks.

2 – Scan-check the material for correct sort by call station.

3 – Report any discrepancies noted to the supervisor.

4 – Place material into proper identified compartments of the delivery vehicle.

5 – Maintain the same delivery call station sequence for the complete route.

6 – Maintain the same delivery time schedule for the complete route.

7 – Obtain any registered, diplomatic or other signature material.

8 – Check item entries against articles for this special mail.

9 – Proceed to first call station, deliver material so addressed, obtain signature as required for special material.

10 – Pick up outgoing material at that call station.

11 – Sort any material addressed to subsequent call stations en route into proper compartments.

12 – Maintain a segregation of the other collected material such as:

(a)   outgoing mail for the Post Office;

(b)   material for call stations other than subsequently en route;

(c)   material for return to Records Office, i.e. files, papers.

13 – Proceed to all succeeding call stations and perform similar operations.

14 – Return to mail room after all call stations have been serviced.

15 – Unload the collected material for disposal action as indicated at Step 12.

NOTE: A call must be made at every call station even if there is no material for delivery to that call station for that scheduled trip.

Section 4 – Outgoing Mail

1. **GENERAL**

   (1) In conjunction with the established messenger services, outgoing mail will be collected throughout the working day and taken to the mail room for preparation and dispatch. Such mail should be processed as it is received and not left to later in the day. This method of immediate processing eases the problem of late day rush periods and inevitable overload situations.

   (2) Mail so processed should be cleared to the Post Office several times during the day. Normally government departments pick up incoming mail from the Post Office a number of times each day and trips for this purpose should also carry all outgoing mail available to the Post Office. This is particularly true where first class items must meet Post Office dispatch schedules and/or where printed matter is being mailed in large volumes. Large volumes of printed matter should be transported to the Post Office in the morning hours when off-peak periods occur at the Post Office.

2. **DISPATCH SCHEDULES**

   (1) Mail dispatch schedules at the Post Office are arranged so as to take advantage of transportation facilities. Therefore, the mail manager must be aware of dispatch schedules and plan his mail clearances to take full advantage of the available services.

   (2) Since dispatch times to distant points vary according to the transportation arrangements, schedules of Post Office dispatches should be obtained and kept posted in the mail room. These may even be posted in offices frequently dispatching large volumes so that their mail for distant points can be prepared in time to connect with the most advantageous transportation services.

   (3) Messenger schedules within the department should make the final collection of outgoing mail at or near the official closing time of the department's daily business. This will ensure the inclusion of all mail for that day's work. Similarly, mail rooms must operate for a sufficient time after the official closing time of the other departmental offices as already discussed under "Organizing the Mail Room".

   (4) There is an excellent slogan "Mail early and often". If this is followed, backlogs will be prevented in the mail room, the mail will be cleared quickly and the speed of transmission will be increased while the task of the Post Office Department will be relieved by a better distribution of mail throughout the day.

3. **BULK OR GROUP ENVELOPE MAILING**

   (1) The "Mail early and often" precept should be applied even to a system of bulk or group envelope mailing. The system requires that large envelopes be pre-addressed to departmental field offices and kept in stock in suitable quantities usually in the sort racks or else immediately adjacent to the sort rack where the mail operations to which they refer are done.

   (2) The mail for the field offices concerned is sorted into the relevant separations on a continuous basis until dispatch time. All the mail for such offices is then inserted into one large envelope for each office. Worthwhile annual savings in the cost of envelopes, letter preparation and the mail handling, both at the dispatching and the receiving office, will be realized by this system (see Plate XVIII).

4. **SORTING OUTGOING MAIL – GENERAL**

   (1) Where there is a large volume of mail a sorting rack should be used. Plate XVIII shows one type of rack.

   (2) Improper classification of mail by the departmental mail room can be costly to the department and to the Post Office. If quantities of routine printed matter are needlessly mailed as First Class items, then

PLATE XVIII

GROUP OR BULK MAILING SORT RACK

unnecessary additional costs result. Each department should ensure that first class mail service is not requested for both printed matter and parcel post items where such need is not established. The originating offices can assist by indicating the class of mail service required on its mailings.

(3) While the staff of the mail room has the responsibility of preparing and sorting mail, it can reduce these needless costs by regulating any abuse of mailing classes. On receiving such advice, the originating offices can assist by adhering to proper mailing classes.

(4) When mail is prepared for dispatch, the various classes should be clearly and distinctly marked on the material through the use of large rubber stamps, or stickers available from the Post Office.

5.   SORTING FIRST CLASS MAIL

(1) In sorting outgoing mail, first class matter should receive priority of processing and be dispatched as soon as possible to the Post Office. Speed of handling and delivery will be increased when departmental mail rooms pre-sort by definite groupings which will reduce the need for a second and complete re-handling at the Post Office itself.

(2) The mail may be sorted by City or Town, by Province or State. If there is not sufficient mail to make up "straights" or direct packages as indicated by use of a "Facing Slip" shown at Plate XIX, then the bundles should be labelled "Canada" or "U.S.A." or other country.

PLATE XIX   **FACING SLIP**

U.S.A.
ÉTATS-UNIS

AIR MAIL
PAR AVION

FOREIGN
ÉTRANGER

NEWFOUNDLAND
TERRE-NEUVE

NOVA SCOTIA
NOUVELLE-ÉCOSSE

NEW BRUNSWICK
NOUVEAU-BRUNSWICK

PRINCE EDWARD ISLAND
ÎLE DU PRINCE-ÉDOUARD

QUEBEC PROVINCE
PROVINCE DE QUÉBEC

ONTARIO

MANITOBA

SASKATCHEWAN

ALBERTA

B.C. – YUKON
COLOMBIE BRITANNIQUE – YUKON

OTTAWA CITY
VILLE D'OTTAWA

OTTAWA GOVT.
GOUVERNEMENT FÉDÉRAL – OTTAWA

MIXED
ASSORTIMENT

(3) Whatever group sort is made, the mail items should be tied up into suitable bundles of manageable size. When this is done, it is necessary to have the bundles tied securely to prevent breakage and subsequent scattering of the envelopes in the mail bags, thus causing a delay at the Post Office.

(4) For small quantities, a Facing Slip, as supplied by the Post Office, should be inserted under the twine binding of the bundles to indicate the specific separation made. For large volumes, however, separate mail bags may be separately tagged in a similar manner with the appropriate identification.

(5) This procedure of labelling bundles or mail bags will assist the Post Office to a degree where earlier delivery at the several destinations will be possible.

6. SORTING THIRD CLASS MAIL

(1) Sometimes it is a requirement to prepare printed matter in large volumes for which the sorting facilities may not be adequate. Departments mailing this class in volume should arrange addressograph plates or addressing machines so that the mail is addressed in sequence to destinations concerned. After addressing, the mail is easily segregated as it comes off the addressing machines. This system of sorting is comparatively simple and postal officials may be able to assist in setting it up on request.

(2) When it is tied up into bundles, printed matter may result in bulky, awkward items which must be very securely tied to prevent the bundles from breaking open.

(3) The volume of printed matter may justify the use of separate mail bags. These bags should also be made up for provinces, etc. as in the case of first class mail. The endorsement "Printed Matter" would be the only additional requirement.

(4) Such mail bags should not be overloaded. The maximum weight which is acceptable in the postal service is 27,240g (60 pounds). Care must be taken that no first class mail is put into these bags inadvertently. This could cause a delay to that mail because of the lower priority handling given to printed matter.

7. SORTING PARCEL POST

(1) In some mail rooms it may be a requirement to prepare parcels for the post. If this is the case, a preparation counter as illustrated at Plate XX will prove to be eminently suitable for this purpose as well as for any other preparatory needs.

(2) Again, parcel post items should be sent to the Post Office separate from the other classes of mail. Parcels should be sorted directly into pre-hung mail bags as received. Also direct parcel post bags should be made up where volume warrants, and labelled with the endorsement "Parcel Post". As in the case of printed matter, such mail bags should not be more than 27,240g (60 pounds) in weight.

8. AIR MAIL

(1) All first class mail items up to 29,964g (66 pounds) in weight are transported by air service within Canada, where such air service will expedite the transmission of the mail.

(2) For other countries, all items of first class mail for which air transmission is required must bear the endorsement "AIR MAIL".

(3) Parcel post packets may also be sent via air transportation means in Canada and also to some other countries. This service is called "AIR PARCEL POST" and the items must bear this indication.

PLATE XX   MAIL STUFFING OR PACKAGING COUNTER

Photo courtesy of Pitney — Bowes of Canada Limited

9. REGISTERED MAIL, OUTGOING

(1) This service should be used only where it is an actual definite need because the registration charges form part of the postal budget of each department. These charges may become excessive, if not discreetly controlled.

(2) Registration is a system whereby a receipt is given by the Post Office for an article at the time of posting, a record kept while the item is in post, and a receipt obtained by the Post Office upon its delivery. This system is used to ensure special security for items of specific importance or value while being transmitted through the mails.

(3) There are various methods of handling outgoing registered mail but these vary only in the details of procedure. The essential point is that this type of mail be controlled by a series of delivery signatures as it passes from hand to hand.

(4) In some departments with a large volume, the allocation of the registered numbers is decentralized to the dispatching, i.e., the preparing, offices. In other departments, the articles are assigned registration numbers by the mail room.

PLATE XXI

ENTERING DETAILS ON POST OFFICE REGISTRATION RECEIPT FORM 33-86-019

NOTE: The forms are prepared in triplicate —
> No. 1 copy is returned to the department signed by the Post Office.
>   2 copy is retained by the Post Office.
>   3 copy is retained by the departmental registered mail clerk until the return of the original copy No. 1 signed by the Post Office.

(5) In the first instance where the preparing office in a department assigns its registration numbers to its registered mail items, the necessary entries are made in triplicate copies of the Post Office Registration Receipt Form 33-86-019 (see Plate XXIII). In the second instance where the registration numbers are assigned by the departmental mail room, the same form is used and again the entries are made in triplicate copies. The operation in a typical situation is shown by the photograph on the opposite page, Plate XXI.

(6) In both cases, the registered mail clerk signs the third copy of the form. Where the forms have been completed by the preparing office, its third copy is returned to that office for retention. The two remaining copies of the forms are retained by the mail room for the purposes explained in the following paragraphs.

(7) An impression is made by a rubber stamp on the registered items in the lower left hand corner and the relevant register numbers are entered in ink as illustrated below at Plate XXII.

PLATE XXII   SAMPLES OF REGISTRATION RUBBER STAMPS
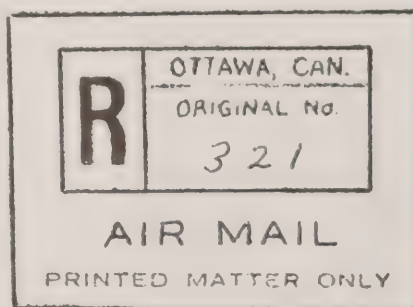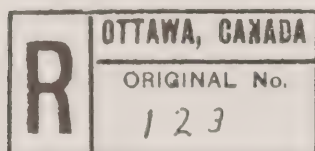
(8) The two top copies of the forms are tied to the registered articles and forwarded to the Post Office. The Post Office acknowledges receipt of the registered articles by signing the original copy of the form and returning this to the dispatching mail room. A register number control sheet may be required as an interim measure, until the signed originals are received from the Post Office. In departments where the preparing office does not retain concrete evidence of the dispatch of registered articles, the operation may be completely controlled at the mail room point.

(9) The registered articles are securely tied with two copies of the Post Office Registration Receipt form included on top of each bundle. The third copy is retained in the mail room and serves as an interim record until one of the two copies sent to the Post Office with the registers is returned suitably signed. When the receipted form is received, the interim copy should be destroyed and the signed copy retained. Receipted forms should be retained one year in accordance with the *General Records Disposal Schedules of the Government of Canada*.

PLATE XXIII

Canada Post **Postes Canada**
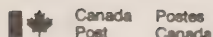
REGISTRATION RECEIPT (BULK)
THIS RECEIPT IS NECESSARY
IF ENQUIRY IS DESIRED

RÉCÉPISSÉ DE RECOMMANDATION (EN NOMBRE)
À PRODUIRE
EN CAS DE RÉCLAMATION

Stamp of Firm			Date Stamp of Post Office
May 1 1979	MAILED BY (Name or Firm) DEPARTMENT OF...................	DÉPOSÉ PAR (Nom ou Raison sociale) *I. Dispatched* (Signature of Mail Room Clerk)	May 1 1979
Timbre de la maison expéditrice	FRAGILE AND PERISHABLE ARTICLES ARE NOT INDEMNIFIED AGAINST DAMAGE AUCUNE INDEMNITÉ NE SERA VERSÉE POUR L'AVARIE D'UN OBJET FRAGILE OU PÉRISSABLE		Timbre à date du bureau de poste

Indemnity and REGISTRATION FEES information is available on request at the Post Office.

Vous pouvez obtenir des renseignements sur les indemnités versées et les DROITS DE RECOMMANDATION en vous adressant à votre bureau de poste.

NUMBER NUMÉRO	NAME NOM	FEE DROIT	ADDRESS ADRESSE
123	Regional Personnel Office	1	....................., Halifax, N.S.
124	Department of	2	....................., Ottawa, Ont.
125	Mr. John Doe,	3	....................., Vancouver, B.C.
126	Ajax Cleaner Co.	4	....................., Toronto, Ont.
		5	
		6	
		7	
		8	
		9	
		10	
		11	
		12	
		13	
		14	
		15	
		16	
		17	
		18	
		19	
		20	

SHEET No.
FEUILLE Nº 1 of 1

Number of Articles
Nombre d'objets 4

Accepted by
Accepté par _____ *I. Received* _____

33-66-019 (1-74)

10. REGISTERED MAIL, OUTGOING – JOB OPERATING PROCEDURES

Step 1 Assign register numbers to the items and enter these numbers on triplicate 33-86-019 forms with their appropriate details.

2 – Stamp registered items with appropriate rubber stamp.

3 – Enter appropriate registered numbers on and within the stamped items.

4 – Retain items in their numbered sequence.

5 – Tie securely to the items both the original and the first duplicate copy of the forms.

6 Place tied packets in mail bag identified as "Registered Mail" for delivery to the Post Office at scheduled times.

7 – Add the registered numbers to the control sheet.   *OR*

8 – Retain the third copy of the form 33-86-019.

9 – Check returned signed copies of the form received from the Post Office against the control sheet.

10 – Destroy the control sheet after verification check.

11 – Retain the returned signed copies of the form.

12 – Destroy the third interim copy of the form on verification.

13 – Retain the signed copy of form 33-86-019.

11. DIPLOMATIC MAIL, OUTGOING

(1) In departments where diplomatic mail is an important consideration, this type of mail is normally received in the mail room already prepared in accordance with the regulations of the Department of External Affairs by the originating office. The special diplomatic envelopes or stickers are serially numbered and all other detail entered in the pre-printed blocks.

(2) Dispatching procedures from the mail room are similar to the checking and receipting processes applied to registered mail articles.

12. OTHER SPECIAL MAIL SERVICES

(1) Special Delivery Service may be used but this service applies only to those points listed as having such a service organized. This may be determined through the *Canada Official Postal Guide*.

(2) Customs declarations forms are used for parcels, when appropriate, for addressees outside Canada and are completed in accordance with the regulations governing dispatch to the country concerned.

13. MAIL REJECT NOTIFICATION

To avoid lengthy and possibly confusing telephone calls to departmental offices concerning omissions or irregularities in the dispatch of mail matter, a "Mail Reject Notification" form should be used. It can be used by the mail clerks to return mail to offices where postal or security requirements have not been complied with (see Plate XXIV).

SAMPLE OF MAIL REJECT NOTIFICATION FORM   PLATE XXIV

▮✚ Government Gouvernement of Canada du Canada	MAIL REJECT NOTIFICATION	AVIS DE COURRIER NON-DISTRIBUÉ

To — A

Branch Security Officer

The attached is returned for your information and necessary action for the following reason(s):
Nous vous renvoyons le pli ci-joint à titre documentaire et à toutes fins utiles, pour le ou les motifs cochés ci-dessous:

☐ Attachment(s)/enclosure(s) missing
Pièce(s)/jointe(s) manquante(s)

☑ Improper security procedure
Procédure de sécurité incorrecte

☐ Envelope(s) required
Enveloppe(s) requise(s)

☐ Packaging insecure
Emballage insuffisant

☐ Error in address
Adresse inexacte

☐ Signature required
Signature requise

☐ Other
Autre _____

From — De

Departmental Mail Room

Signature *J Detect*

Date *30 July 1979*

CGSB STANDARD FORM 119   7540-21-868-7152   FORMULE NORMALISÉE 119 DE L'ONGC

Note: 1. The use of this form provides a means by which omissions or irregularities in the receipt or dispatch of mail matter, can be brought to the attention of the office concerned.

2. This is a simple and impersonal way of communicating with user offices.

3. Avoids time consuming telephone calls.

4. No hesitation on the part of mail room employees to reject and return items of mail which do not conform to established operating procedures or post office regulations.

14. LOST MAIL INQUIRY

To cope with the occasional inquiries which arise concerning lost mail, a form memorandum should be used by the mail room to initiate a postal investigation. An example is shown at Plate XXV.

PLATE XXV   SAMPLE OF LOST MAIL INQUIRY FORM

◼✿ Government of Canada	Gouvernement du Canada	LOST MAIL ENQUIRY	ENQUÊTE COURRIER PERDU

☑ Registered Mail Recommandé	Registration No. Nᵒ d'enregistrement	Date Despatched Envoyé le	Date of Enquiry Date de l'enquête
☐ Ordinary Mail Ordinaire	*125*	*31 May 79*	*30 June 79*

Method of Transmission – Mode d'acheminement

☑ Air   ☐ Surface   ☐ Not known / Inconnu

Description

☑ Envelope / Enveloppe   ☐ Parcel / Colis   ☐ Roll / Rouleau

Contents – Contenu

Salary Cheque

Complete Mailing Address on Lost Mail – Adresse complète figurant sur la pièce perdue

Mr. John Doe
234 Some Street
Anytown, Ontario

Addressee denied receipt?
Le destinataire nie-t-il réception?

☑ Yes / Oui   ☐ No / Non   Date ▶ *25 June 79*

Investigation requested by
Enquête demandée par

John Smith

Branch/Division

Personnel

Telephone – Téléphone

2-3456

RESULT OF ENQUIRY – RÉSULTATS DE L'ENQUÊTE

Post Office advises that registered letter 125
was signed for by Mrs. J. Doe on 6 June 1979.

(Mr. Smith advised by phone)

☑ Investigation closed
Enquête terminée

☐ Pending
En suspens

30 July 1979   Date   *J. Foundout*   Signature

CGSB STANDARD FORM 123	7540-21-870-3870	FORMULE NORMALISÉE 123 DE L'ONGC

All postal investigations into matters of lost mail should be instituted by the mail room and not by the different offices of a department.

15. MAIL SERVICE SURVEY

To aid in determining the appropriate service available. the form shown at Plate XXVI should be used within a department. Its various uses are listed below.

SAMPLE OF MAIL SERVICE SURVEY FORM **PLATE XXVI**

■❋ Government of Canada	Gouvernement du Canada	**MAIL SERVICE SURVEY**	**ENQUÊTE SUR LE SERVICE DU COURRIER**

WE WISH TO KNOW THE TIME TAKEN TO DELIVER THE ENCLOSED MATERIAL SO THAT APPROPRIATE ACTION CAN BE TAKEN TO IMPROVE THE MAIL SERVICE, IF NECESSARY.

NOUS SOUHAITERIONS CONNAÎTRE LE DÉLAI DE DISTRIBUTION DU PLI CI-INCLUS AFIN D'AMÉLIORER, AU BESOIN, LE SERVICE DU COURRIER.

PLEASE COMPLETE AND MAIL THIS CARD TODAY.

POUR CELA, VEUILLEZ REMPLIR CETTE CARTE ET LA POSTER DÈS AUJOURD'HUI, MERCI.

	Date	Time Heure	Address — Adresse
SENT EXPÉDIÉ			
RECEIVED REÇU			
RETURNED RENVOYÉ			

CGSB STANDARD FORM 126   FORMULE NORMALISÉE 126 DE L'ONGC

NOTE:

1. The use of the above form establishes beyond doubt the time elapsed in postal transmission between sender and addressee.

2. It settles administrative arguments.

3. It determines whether changes in service endorsements are required.

16. SPECIALIZED OPERATIONS

In some departments, the mail room is assigned several associated functions such as:

(a)   addressograph service;

(b)   copying service;

(c)   bulk distribution of pamphlets, circulars, etc.

17. POSTAL CODE SYSTEM (see Plate XXVII)

(1)   A Postal CODE system has been introduced by the Post Office and the codes are a permanent part of a postal address. The codes determine the destination of mail down to one side of a city street between intersections and sometimes even further. A CODE is composed of both letters and numbers in the form of "ANA NAN", where "A" is a letter and "N" is a number with one space between the first three and the last three characters.

(2)   Since these CODES speed up mail processing at the Post Office, departmental mail rooms should ensure that departmental dispatching offices are using these CODES on their outgoing mail. For complete information, consult the *Postal Code Directory* obtainable from the Post Office Department.

18. DETAILED POSTAGE COST CALCULATION

(1)   The major portion of this Section 4 has dealt with the processes of sorting the outgoing mail for identification of, and segregation into, the particular mail classes normally dispatched by a government department or agency. It has also covered the further segregation of the outgoing mail into destination groupings, and it has been established that these pre-sort systems will assist in the subsequent speedier handling of the mail.

(2)   In addition, these processes will assist in the initial stages of mail handling within the departmental mail room for the efficient calculation and application of the appropriate detailed postage cost amounts to be affixed to the several mail groupings. Any single item of outgoing mail consisting of a standard size 22.9 by 10.2cm (9 by 4 inch) envelope with a two-sheet insert of 22.5 by 28cm (8½ by 11 inch) bond paper will not weigh more than 28.35g (1 ounce): therefore, all such items may be fed through the postage meter machine which has been set to the required postage amount for one first class mail unit of this nature.

(3)   On the other hand, in dealing with bulk or group envelopes, it will be necessary to weigh such envelopes for postage cost calculation on an individual basis more or less. Then, a postage meter gummed tape at the determined amount will be applied to each specific envelope.

(4)   Furthermore, the registered mail articles will require the application of the additional registration fee. Parcel post packages will have been naturally segregated merely by their bulkiness and these will also require an individual type of handling for weighing and postage cost application procedure.

LETTER SORTING MACHINE   PLATE XXVII

One section of the automated installation used in conjunction with the Postal CODE System at the Ottawa Post Office.

DAMAGED MAIL   PLATE XXVIII

Items of mail including government material received at the Ottawa Post Office in damaged condition because of improper dispatch packaging.

PART III

THE ROLE OF THE POST OFFICE DEPARTMENT

1. INFORMATION ON POST OFFICE REGULATIONS

(1) Although this part contains information which could be found in the manual *Canada Official Postal Guide*, it is provided here for ready reference.

(2) All mail matter may be divided into four general classifications:

FIRST CLASS MAIL; SECOND CLASS MAIL; THIRD CLASS MAIL; FOURTH CLASS MAIL.

(3) First Class Mail is any communication or document wholly or partly in handwriting or typewriting, sealed or unsealed, except manuscripts of books and newspapers. Post cards wholly or partly in handwriting or typewriting are included in this class.

(4) Second Class Mail includes newspapers and periodicals printed and published in Canada and posted by the publisher at the post office in the postal area where they are published.

(5) Third Class Mail is often referred to as "PRINTED MATTER". It refers to reproductions in several identical copies by means of a mechanical or photographic process involving the use of a plate or negative. This does not include typewritten originals or carbon copies. This class may also include partly printed and partly written matter such as customs manifests and government documents and returns on official blanks. Where doubt may exist, the eligibility of specific items should be obtained from postal officials.

(6) Fourth Class Mail is also known as "PARCEL POST" and includes farm and factory products and merchandises of all descriptions. Parcels consisting of third class matter may also be mailed as parcel post.

(7) In addition to these four classifications, the Post Office offers SPECIAL SERVICES for mail matter as follows:

(a) Householder Mail is third class matter, unaddressed or addressed simply "HOUSEHOLDER" or "BOXHOLDER", etc. without any further address. It is the duty of the Postmaster to see that one piece is delivered to each point of call as far as the supply permits. This type of mailing is particularly useful for mailing of large quantities of Printed Matter where the desire is to cover each point of call in a specific area without reference to individual addresses. Use of this service may result in considerable savings to departments in processing costs. Departments should ensure, through the local Post Office, the correct make-up, content and classification of such material;

(b) C.O.D. – Cash On Delivery – is a system whereby mail matter may be sent subject to the collection of charges from the addressee for remittance to the sender by post office money order;

(c) Special Delivery letters and parcels addressed for delivery within the letter carrier delivery area of Post Offices will be given priority handling through the mails and at the receiving end. When mailed, special delivery items must bear a special delivery sticker obtainable from the Post Office. They must be handed to Post Office personnel separate from the ordinary mail.

2. ADVICE ON ADDRESSING AND PREPARATION OF OUTGOING MAIL

(1) Addressing – all items of mail should bear an address which is complete and clear and free of any unnecessary words or notations and should include:

(a) name of addressee;

(b) suite or apartment number;

(c) number of house, apartment block, hotel, etc.;

(d) name of street, road, etc.;

(e) name of city, town, etc. in CAPITAL LETTERS;

(f) postal CODE designation when addressed to major cities; and

(g) name of province, or state;

(h) name of country, if other than Canada.

    EXAMPLE: Mr. John Doe,
             Apt. 303, 2055 Carling Avenue,
             OTTAWA, Ontario
             K2A 1G6.

(2) Preparation of all types of mail should be such that they may be handled by the postal service in an efficient and speedy manner. Different classes of mail should not be mixed together and this should be particularly avoided in the case of first class mail. Since first class mail usually requires a high priority of handling, it must not be mixed with the other classes of mail with lower priorities.

(3) Large first class items should always be endorsed "FIRST CLASS MAIL". Where volumes of such mailings are fairly large, rubber stamps should be used for the purpose. Large items of first class mail not so endorsed may not be recognized and consequently be processed as Printed Matter by the Post Office.

(4) Items requiring special services, such as Registered Mail or Special Delivery, must be separated from ordinary mail when sent to the Post Office.

(5) Personal outgoing mail with postage stamps affixed should be bundled separately from the official department mail. However, the use of the mail room as a transporting facility to the Post Office for personal mail should be discouraged.

3. INQUIRIES AND REPORTS

Inquiries on delay, damage, loss, etc. should be made to the postal authorities immediately it becomes apparent that such delay, damage or loss has occurred. All pertinent details should be made available to postal officials. These would include name and address of the sender and addressee, time and date of mailing, and in the case of delay the time of arrival at the place of delivery. For lost or damaged mail, a full description of the article is required.

4. POST OFFICE ASSISTANCE

(1) Post Office assistance to government departments in the field of mail processing is an expanding programme and the Post Office Department is prepared to afford technical guidance and advice to other government departments in establishing and organizing mail rooms and mail handling techniques.

(2) In addition, the Post Office Department is able to provide advice on many mailing problems such as bulk mailings of Printed Matter and Householder items. Such assistance will help the departments to prepare and mail large volumes of various classes of mail in an economical and efficient manner so that the best service will be obtained at a reasonable cost.

(3) The mail manager should maintain a good knowledge of the Post Office Regulations. He should keep himself informed of the changes in postal regulations, and, in particular, should have a knowledge of mail dispatch schedules from the Post Office to distant points and should be aware of schedule changes as they occur.

APPENDIX A

INCOMING MAIL OPERATIONAL CHECKLIST

DEPARTMENT/AGENCY	BRANCH, DIVISION, or UNIT		
LOCATION	OFFICER in CHARGE		PHONE

	YES	NO	Otherwise Remarks
1. Organization			
(a) Is the Mail Operations & Service a responsibility of the Records Manager?			
(b) If not, why not?			
(c) Are there any other Mail Rooms in the organization? *			
2. Receipt of Mail from Post Office			
(a) At what time(s) is mail received?			
(b) How is it delivered?			
(c) What is the total volume received? (Average per day, week or month)			
(d) How is this volume determined? (By a count, measure or weight)			
(e) Is mail room staff on hand before the regular working hours so that processing is begun immediately when mail is received?			
(f) If mail is time or date stamped, what mail-types are so processed and why?			
(g) What is the volume of mail so stamped? (Average as above)			
3. Initial Sort			
(a) Into what categories is mail first sorted immediately on receipt?			
(b) After initial sort, what mail-types are forwarded UNOPENED for delivery?			
(c) What is the volume of such unopened mail? (Average)			

*If yes, separate checklist must be completed for each.

NOTE: The fact that a certain question is asked in any of the three checklists, Appendices A, B, and C, does not necessarily mean that the procedure is desirable or correct.

YES	NO		REMARKS

4. Mail Opening

(a) Is the mail opened:
  - (i) if not, why not?
  - (ii) if so, manually? or
  - (iii) mechanically?

(b) Are emptied envelopes retained?

(c) For how long?

(d) Or do the opened envelopes go forward with the enclosures?

(e) If so, are the envelopes also eventually placed on file with the enclosures?

(f) If so, why?

5. Routing Unopened Mail

(a) What routing information is placed on envelopes of unopened mail?

(b) Is this information placed directly on the envelopes or is there:
  - (i) a routing attachment?
  - (ii) a routing container?

(c) Do routing guides exist to show where unopened mail is to be delivered?

(d) If yes, how are these guides kept up to date?

6. Routing Opened Mail

(a) What types of opened mail are forwarded for delivery directly from the Mail Room?

(b) What is the volume of this mail? (Average)

(c) What types of opened mail are sent to the Records Office for processing?

(d) What is the volume of this mail? (Average)

(e) Is opened unprocessed mail forwarded for direct delivery sent:
  - (i) loose?
  - (ii) bulk enveloped?

7. Special Processes in Mail Room

(a) What mail-types, if any, are answered or acknowledged in the Mail Room?

(b) What is the volume of this mail? (Average)

YES	NO	REMARKS

(c) Do security classifications on mail impose special handling — such as enveloping, wax-sealing of envelopes, registration entries for receipt signatures, etc.?

(d) What special processes are followed to handle moneys received in the mail?

(e) Is the system check-audited by the representative of the Auditor-General?

8. **Distribution Delivery**

(a) How are deliveries made:
   (i) by automated devices?
   (ii) by organized messenger service?
   (iii) by clerical staff ?

(b) What is the time period between the receipt of mail in the Mail Room and delivery to action offices for the following categories:
   (i) forwarded unopened after initial sort?
   (ii) forwarded after opening but without further processing?

9. **Processing Cost**

(a) What is the processing rate per employee for one thousand pieces of mail and the cost for:

Volume   Time

Number of Employees	Employees Class'ns	Salaries	Cost/ 1,000

   (i) Mail Opening?
   (ii) Time-Date Stamping?
   (iii) Sorting?
   (iv) Routing?
   (v) Answering/Acknowledging?
   (vi) Money Processing?

(b) What is the cost per reference to any incoming mail recording system, i.e., to registered mail, money-mail, etc.? (Total cost of record divided by the number of references)

(c) What is the average cost of processing 1,000 pieces of mail from time received in Mail Room until delivered to action offices?

	YES	NO	REMARKS

10. **Equipment, Supplies & Workflow**

(a) List the amounts and kinds of equipments used for:
    (i)   Mail Opening;
    (ii) Time-Date Stamping;
    (iii) Sorting;
    (iv) Routing;
    (v) Recording;
    (vi) Numbering (serially);
    (vii) Copying.

(b) Are these equipments adequate as to amount and type?

(c) Are these equipments placed for maximum efficiency of use by operating staff and workflow?

(d) What is the schematic workflow for incoming mail — chart of the floor plan of the Mail Room?

11. **Other Observations**

APPENDIX B

MESSENGER SERVICES and INTEROFFICE MAIL OPERATIONAL CHECKLIST

	YES	NO	REMARKS

Messenger Services

(1) Is delivery and pick-up performed on an established schedule?

(2) If so, what is this schedule — is there a written schedule?

(3) Does the frequency of trips provide adequate service?

(4) Excessive service?

(5) Are the delivery routes arranged so that there is no overlapping or duplication?

(6) Are the delivery stops based on an assessment of the requirements?

(7) Are the requirements re-appraised at specific intervals?

(8) Are requirements revised and adjusted to organizational and/or physical changes which occur?

(9) Is there a floor plan of routes and stops?

(10) Do messengers sort inter-office mail en route as it is collected so that delivery is made during a trip so far as possible?

(11) Is SPECIAL messenger service controlled and provided only for most exceptional cases?

(12) Are messengers:
  (i)   centrally pooled?
  (ii) if so, based at the Mail Room?
  (iii) assigned otherwise on a planned basis?
  (iv) if so, how is this done?

(13) What is the average cost of transporting one thousand pieces of mail by the messenger service? (i.e. total cost of messenger service divided by total volume of mail transported, times 1000)

(14) Are automated systems in use in lieu of messengers for delivery to central points or stations?

(15) If not, are there any plans for such a system?

(16) List the amounts and kinds of equipments, supplies (including forms) used by the messengers:
  (i)   hand-trucks;
  (ii) boxes, locked or unlocked;
  (iii) motor vehicles.

	YES	NO	REMARKS

(17) If motor vehicles, are they used for purposes other than delivery service as well? (People, furniture, etc.)

(18) Does this activity interfere with the delivery schedules?

(19) Are clerks being employed in the operation of the motor vehicle?

(20) If yes, do they have chauffeurs' licences?

(21) What is the cost of operating the motor vehicle?

(22) Are the equipments, supplies, etc. adequate as to amount, type and design?

(23) Are special security requirements a factor in the kind of equipments used, i.e. locks, locked boxes, locked trucks?

Inter-Office Mail/Files

(1) What is the volume received in the Mail Room of:
   (i) loose inter-office mail?
   (ii) files inter-office?

(2) What volume is sorted for delivery without processing in any other way:
   (i) loose inter-office mail?
   (ii) files inter-office?

(3) If other processes are followed, what are they and why?

(4) If a record is made, what type is used and how is it arranged?

(5) What use is made of this record?

(6) What is the rate of reference to this record?

(7) How long is it kept?

(8) What is the time period between pick-up of inter-office mail/files and redelivery to the addressee offices?

Non-Messenger Duties

(1) Does the messenger staff perform other unrelated duties?

(2) If yes, list such duties—
   (i)   duplicating
   (ii) furniture moving
   (iii) maintaining supplies
   (iv) minor repairs to equipments.

(3) *Other Observations*

APPENDIX C

OUTGOING MAIL OPERATIONAL CHECKLIST

	YES	NO	REMARKS

1. **Receipt in Mail Room for Post Office**

(a) At what time(s) is mail received from departmental offices?

(b) What is the total volume received? (Averages)

(c) How is this volume determined? (By count, measure or weight)

(d) Is mail staff on hand after regular working hours so that mail is all processed for delivery to Post Office?

(e) Are outgoing dispatches co-ordinated with Post Office schedules?

(f) How is mail delivered to Post Office?

2. **Dispatch Preparation**

(a) In preparation for dispatch which of the following actions are performed in the Mail Room:

    (i) a check for proper number and kinds of copies present?

    (ii) a check for all enclosures present?

    (iii) correspondence and letter address comparative check?

    (iv) removal of copies present but not for mailing?

    (v) time-stamping of copies not for mailing?

    (vi) assignment of serial numbers?

(b) Are mail envelopes sorted before being bagged for delivery to the Post Office?

(c) If so, how:

    (i) by provinces?

    (ii) by Canadian geographical areas?

    (iii) for overseas?

    (iv) for U.S.A.?

    (v) for airmail?

    (vi) for diplomatic?

    (vii) registered mail?

    (viii) local delivery?

(d) Is mail bulk or group enveloped by addressees?

(e) If not, why not?

	YES	NO	REMARKS

3. **Control Processes – Recording**

(a) What mail-types are recorded before dispatch?

(b) What is the volume of such mail?

(c) What type of record is made or used? (Card, ledger, letter-book?)

(d) How is this record arranged:
 (i) by date of letter?
 (ii) by sender source?
 (iii) by delivery source?

(e) What entries are made on this record?

(f) What use is made of this record?

(g) What is the rate of reference to this record?

(h) What time is consumed in making this record?

(i) How long is this record kept?

4. **Control Processes – Briefing**

(a) What mail-types are briefed?

(b) What is the volume of such mail?

(c) What use is made of this brief?

(d) What is the rate of reference to this brief?

(e) What time is consumed in making this brief?

(f) How long is this brief kept?

5. **Copying**

(a) Is mail reproduced for:
 (i) follow-up?
 (ii) file purposes?

(b) if so, are copies made by:
 (i) typing?
 (ii) photocopying?
 (iii) stencil/plate?

(c) If so, what is the volume processed for copying?

(d) What is the volume of copies produced?

(e) Therefore, the average number of copies is

6. **Special Processes**

(a) Do security classifications on mail impose special handling processing, such as double enveloping, wax-sealing of envelopes, registration entries for receipt signatures?

YES	NO	REMARKS

(b) Aside from (a) above, what is the volume of registered mail?

(c) Aside from bulk or group enveloping, are pre-addressed envelopes used?

(d) Are window envelopes used where bulk or group enveloping is not applicable?

(e) Does the Mail Room handle printed matter in bulk:
 (i) addressograph?
 (ii) folding?
 (iii) envelope stuffing?

(f) What postage costing system is used?

(g) Who is responsible for determining this cost?

7. **Processing Time**

What is the normal period between receipt of mail in the Mail Room and dispatch to the Post Office?

8. **Processing Cost**

(a) What is the processing rate per employee for one thousand pieces of mail and the cost for:

	Volume	Time		Number of	Employees Class'ns	Salaries	Cost/ 1,000

 (i) preparation for dispatch?
 (ii) recording?
 (iii) briefing?
 (iv) copying?
 (v) addressograph?
 (vi) folding?
 (vii) envelope stuffing?

(b) What is the cost per reference to outgoing mail records?

(c) What is the average cost of processing 1,000 pieces of mail from time received in Mail Room until delivered to the Post Office?

9. **Equipment, Supplies and Workflow**

(a) List the amounts and kinds of equipments used for:
 (i) sealing;
 (ii) tying;
 (iii) folding;
 (iv) addressing envelopes;
 (v) stuffing envelopes.

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(b) Are these equipments adequate as to amount and type, and placed for maximum efficiency of use?

(c) What is the schematic workflow for outgoing mail? See also Appendix A, 10(d).

10. **Other Observations**

APPENDIX D

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APPENDIX E

GLOSSARY

1. ADDRESSOGRAPH MACHINE: Used to address envelopes electrically for bulk or group mailing procedures.

2. AISLES: An area of space sufficient to allow freedom of movement and to prevent interference with and between the different mail room operations.

3. BASE: A stand or table on which sort racks are placed.

4. BIN: See "COMPARTMENT".

5. BULK or GROUP ENVELOPING (or MAILING): A procedure whereby outgoing loose correspondence destined to one specific field office or other single address is grouped together into one envelope in the mail room prior to postal dispatch.

6. COMPARTMENT: A "pigeon hole", "bin", "cell", or "slot" in a sort rack or a delivery cart in which mail, documents and files are placed according to specific groups.

7. COUNTER BOY: See "TAPE SHOOTER".

8. DISTRIBUTION: The circulation and delivery of mail, documents and files within a department or agency.

9. FACILITIES: The components of the mail room necessary for the provision of services to the department or agency in the receiving, opening and distribution of incoming mail; the collecting and the preparation of outgoing mail to the post office.

10. GROUP ENVELOPING (or MAILING): See "BULK or GROUP ENVELOPING".

11. LAYOUT: The physical arrangement of mail room equipment and furniture items according to a specific workflow plan.

12. LETTER OPENER: A manual or electric machine used for the opening of small and large envelopes.

13. MAIL BAG HOLDER: A metal stand on casters used to hold post office mail bags in an open position.

14. OFFICE FURNITURE ITEMS: Desks, chairs, tables, waste baskets, telephone stands, etc.

15. RACK: An item of mail room equipment consisting of several compartments in which mail, documents and files are placed according to specific groups.

16. SCALE: Used to weigh and calculate postal expenditures.

17. SORT: The physical act of separating mail, documents and files into specific groups in accordance with functional or geographic identification delivery addresses.

18. STORAGE: An area of space set aside in the mail room proper for delivery vehicles, bulk items, etc.

19. TAPE SHOOTER: A manually operated piece of equipment associated with mail rooms which holds and dispenses moist gummed paper tape used for sealing packages.

20. WORK FLOW: The flow of work in a continuous line in accordance with a sequence of operations designed to avoid or reduce the walking, doubling back, or duplicating of actions.

21. WORKING SURFACE: That area on a table or counter top that is used to process incoming, outgoing and intradepartmental mail, documents and files.

APPENDIX F

MESSENGER HAND-TRUCKS   PLATE XXIX

MAIL CARRIER CART

Courtesy of Vanbo Sales Ltd., Ottawa.